

# HISPANIC/LATINO



## MARKET PROFILE



Magazine Publishers of America

# MISSION RESPONSIBLE

Magazine Publishers of America (MPA) is dedicated to establishing diversity initiatives that promote a culture of inclusion. We believe that such efforts may enhance the success of magazines and satisfaction among the readers they serve.

To that end, we shape, analyze and develop a variety of sales tools to help advertising and marketing professionals understand changing markets and major trends affecting their clients/customers, products and services. The Market Profiles series offers an in-depth look at particular advertising categories and demographic groups of importance to advertisers, agencies and our members.

This profile addresses the impact of the growing Hispanic/Latino market, up almost 58% from 1990 to 2000, representing almost 15% of the U.S. population and wielding \$653 billion in purchasing power in 2003. Other profiles in this series focus on the African-American, Asian-American and the Teen markets.

## MARKET DEFINITIONS

**Hispanic:** relating to or derived from the people, speech or culture of Spain or Portugal.

NOTE: Widespread usage of the term “Hispanic” dates back to the 1970s, when the Census asked Hispanics to self-identify as Mexican, Puerto Rican, Cuban, Central/South American or “other Hispanic.”

**Latino:** people of “Latin-American” descent.

NOTE: While the terms Hispanic and Latino are used interchangeably, they do have different connotations. Hispanic Trends, Hispanic Magazine’s polling firm, reported that 65% prefer the term Hispanic, while 30% prefer Latino. Our report uses both to refer to the same group, except when quoting sources directly.

Hispanic/Latino purchasing power is estimated to reach \$686 billion dollars in 2004. Spending power in 2009 will be \$992 billion, more than quadruple the \$221 billion reported in 1990.

Compiled by MPA’s Information Center and Research Department, the profiles synthesize the most recent findings from dozens of sources. To access additional copies of this and other market profiles, please visit our website, [www.magazine.org/marketprofiles](http://www.magazine.org/marketprofiles). For further detail on content, please e-mail [infocenter@magazine.org](mailto:infocenter@magazine.org).

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Hispanic/Latino Market Profile  
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# SNAPSHOT OF THE HISPANIC/LATINO MARKET

The Hispanic/Latino influence is mainstream to American culture: its music, dance, food and fashions are all ubiquitous. Given the sheer size and economic impact of the market, it's no wonder.

Now 43.5 million strong, Hispanics/Latinos are a fast-growing, diverse ethnicity in the United States. With growth surging nearly 58% from 1990 to 2000—more than four times the growth rate of the U.S. population—and almost another 13% from 2000 to 2003, Hispanics/Latinos comprise 14.7% of the total population.

## MARKET OPPORTUNITIES

- Size, growth and spending power
- Skews younger than the U.S. population — particularly strong teen market
- Urban population concentrations (of one million or more) allows relatively easy geographic targeting
- Pan-Latino identity: bound by common language (Spanish) and/or common immigrant experiences

## MARKET CHALLENGE

- Hispanics hail from different 20 countries — each with its own cultural nuances
- Varying levels of acculturation, language usage and assimilation, which can influence language preference

More significantly, the community is expected to keep growing at a strong and steady clip — by 2010 it is estimated that there will be 56 million Hispanic/Latinos; by 2050, 30% of the entire U.S. population will be Hispanic.

From 2002 to 2003, the purchasing power of Hispanics/Latinos climbed more than 11% to \$653 billion. By 2007, it will top \$926 billion, according to the University of Georgia's Selig Center for Economic Growth. The estimated 8.7% compound annual growth from 2000-2007 is 80% greater than that of the rest of the U.S. population.

Despite the vast potential, targeting the Hispanic/Latino market holds many challenges, largely due to the range of cultures from which they hail and their varying degree of language preferences.

Sources: U.S. Census Bureau June 14, 2004; Marketing to Emerging Majorities; Synovate Hispanic Study 2004; Selig Center for Economic Growth—Second Quarter 2003.

# MARKET SEGMENTATION

The Hispanic/Latino presence can be traced to early American history — more than 400 years back in time. Its culture and language, though, remain vibrant due to the proximity and constant flow of migration between Central and South American homelands and the United States. While the majority of certain groups like Puerto Ricans, Cubans and Dominicans have lived in the United States 15 years or longer — 62% of all Hispanic adults have lived in the United States 15 years or less.

## VARIATIONS ON MARKET SEGMENTATION

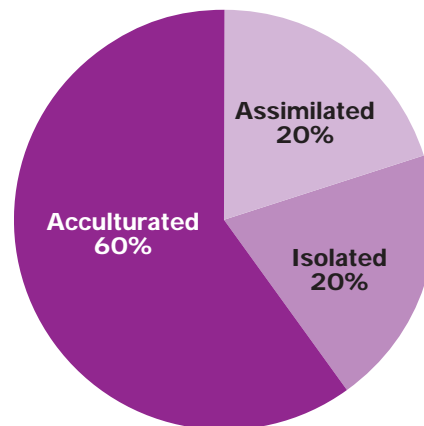
Researchers traditionally segmented the Hispanic/Latino market by country of origin. But today they believe that length of U.S. residency, language preference and usage as well as degree of acculturation should also guide marketers. Discussions with leading advertising agencies indicated that most use a variety of these factors in determining their strategy.

### ACCULTURATION LEVELS

**Acculturated:** Hispanics/Latinos who adopt or borrow customs or traits from a different culture and are bilingual.

**Assimilated:** Those who leave their culture and customs behind for another. Assimilated Hispanics/Latinos speak only English.

**Isolated:** Hispanics/Latinos who have recently migrated and speak only Spanish.



Hispanic/Latino Segments by Acculturation

## DID YOU KNOW?

- “Hispanic” is an ethnicity, not a race.
- The Census tracks six races: White, Black, Asian, American Indian/Alaska Native, Native Hawaiian/Pacific Islander and “some other race.”
- The 2000 Census was the first that allowed Americans to self-identify as multicultural. Seven million designated themselves as multicultural.
  - 48% of Hispanics identified as “White only”
  - 42% of Hispanics identified as “some other race”
  - 2% of Hispanics identified as “Black only”
  - 2.2 million Hispanics also reported belonging to two or more races

Sources: U.S. Census Bureau 2000, Synovate 2004; Multichannel News 10/30/00; Adweek 11/02; *The Miami Herald* 5/24/01; *American Demographics FORECAST* 4/21/01

# LANGUAGE PREFERENCE

The issue of bilingualism especially among acculturated Hispanics/Latinos is of particular interest — it continues to fuel a 20-year debate on whether to advertise in Spanish or English.

**46% of Hispanics are Spanish-dominant speakers**  
**23% are bilingual**  
**63% speak Spanish at home**

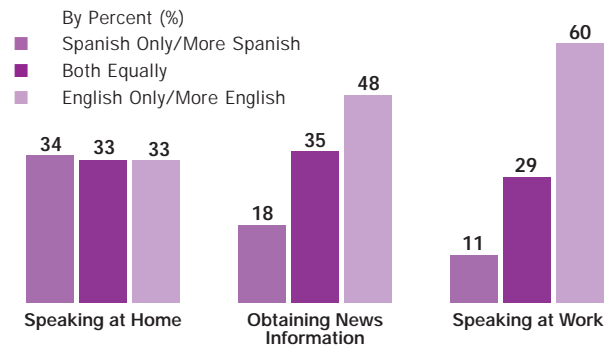
Language use varies widely among Hispanics/Latinos according to whether they are at home, obtaining news information or at work. Third-generation Hispanics/Latinos are more English-dominant speakers than first generation. Second-generation Hispanics/Latinos are the most bilingual.

## PRIMARY LANGUAGE AMONG LATINOS BY GENERATION IN THE UNITED STATES

	First Generation	Second Generation	Third Generation
English Dominant	4%	46%	78%
Bilingual	24%	47%	22%
Spanish Dominant	72%	7%	

Source: Pew Hispanic Center, Survey Brief, March 2004

## LANGUAGE USAGE BY HISPANIC ADULTS



Source: Pew Hispanic Center, Survey Brief, March 2004

Some marketers determine preference by the consumer's first language, physical location, degree of acculturation and/or age. According to *American Demographics*, Hispanics whose first language is Spanish prefer Spanish ads — while those who learned Spanish after, or in tandem, with English, favor English ads. However, acculturated Hispanics are equally devoted to media in both languages, and it is therefore, believed that their product choices are based on quality and appeal, not language alone. A study conducted by the Food Marketing Institute and Advo found that more than half of Hispanics recalled bilingual ads, while less than half recalled advertising that was either Spanish or English only.

According to Cheskin Research, Hispanic teens respond best to bilingual ad messages, especially from English-language celebrities “who happen to slip in some Spanish” — because it mirrors their own usage patterns.

Sources: Synovate 2004 U.S. Hispanic Market Report; Research Alert 2000; *People en Espanol* Hot Study, 2001

# POPULATION AND GROWTH TRENDS BY COUNTRY OF ORIGIN

The three largest Hispanic/Latino countries represented in the United States are Mexico, Puerto Rico and Cuba. While Mexicans represent nearly 60% of the entire Hispanic/Latino population, all of these segments charted double digit growth surges from 1990 to 2000. The group with the most growth was “other Hispanic/Latino,” which is extremely diverse because it represents people from 20 different countries, including 17% who did not identify (by country) at all.

## U.S. HISPANICS BY COUNTRY OF ORIGIN

Country	1990	2000	% Growth	% of Total Hispanic Population (2000)	2004 Estimated
Mexico	13,501,851	20,640,711	53	58.5	28,984,000
Puerto Rico	2,727,195	3,406,178	25	9.6	3,831,000
Cuban	1,050,640	1,241,685	19	3.5	1,675,000
Other Hispanic	5,096,725	10,017,244	97	28.4	9,076,000

## WHERE DO OTHER HISPANICS/LATINO HAIL FROM?

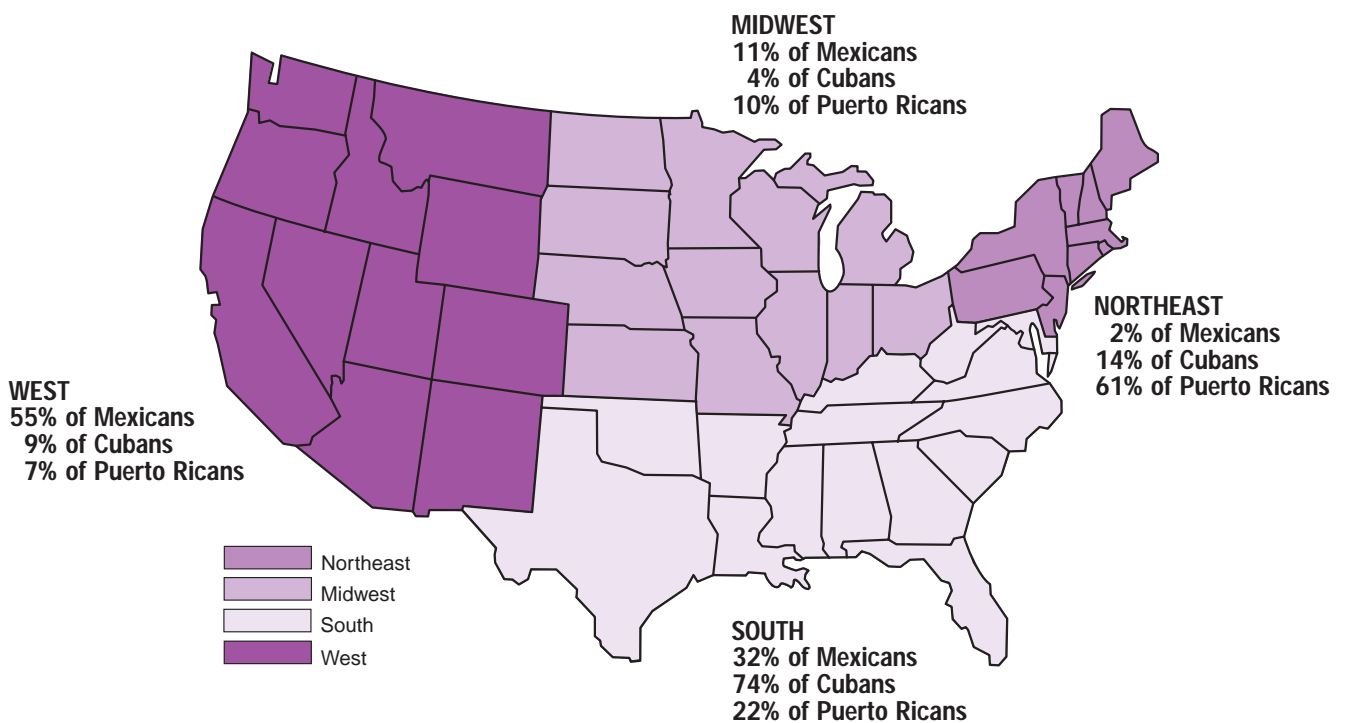
Central America	1.7 million
South America	1.4 million
Dominican Republic	765,000
Spain	100,000
<b>Unknown</b>	<b>6.1 million</b>

Source: U.S. Census Bureau 2000

# AREAS OF GEOGRAPHIC CONCENTRATION BY COUNTRY OF ORIGIN

The three primary country groups show affinities for different regions, creating their own areas of concentration nationwide. For example, nearly three-fourths of all Cubans reside in the South. This kind of clustering allows markets to capitalize on regional/cultural nuances by fine-tuning product, distribution and/or ad messaging. For example, McDonald's rolled out Cuban-style sandwiches and Mango-Pineapple sauce for McNuggets in South Florida and a totally different "Fiesta Menu" in Los Angeles to appeal to the Mexican palate.

## HISPANIC/LATINO POPULATION BY REGION



### DID YOU KNOW?

- Census estimates for July 2003 showed Texas had a 49.5% minority population (made up of all people except single-race, non-Hispanic Whites). Hawaii's minority population is 77%; New Mexico's—56%; California's—55% and Washington, D.C.'s—72%.

Sources: U.S. Census Bureau 2000, Synovate 2004; Forecast Analysis 2000; *American Demographics FORECAST 4/21/01*

# AREAS OF GEOGRAPHIC CONCENTRATION BY U.S. CITY

Hispanics/Latinos tend to settle in the ten urban locations listed below. Here alone, marketers can effectively reach 60% of the entire Hispanic/Latino population. And, because they number more than one million, Hispanic/Latino residents greatly contribute to the cultural and economic fabric in these locations.

## THE TOP 10 U.S. HISPANIC/LATINO MARKETS

	Population. (\$ millions)	General Market Rank	% of Area's Population	Buying Power (\$ billions)	% U.S. Born	Country Origin Majority
Los Angeles	7.8	2	N/A	78	28	Mexico (75%)
New York	4.3	1	19	47	24	Puerto Rico (31%)
Miami/Fort Lauderdale	1.8	12	41	26	13	Cuba (45%)
Chicago	1.8	3	17	17	23	Mexico (75%)
Houston	1.8	10	30	16	30	Mexico (73%)
Dallas/Fort Worth	1.5	9	22	14	30	Mexico (79%)
San Francisco/San Jose	1.5	5	17	16	28	Mexico (70%)
San Antonio	1.3	30	55	13	67	Mexico (N/A)
Phoenix	1.2	14	25	11	37	Mexico (81%)
Rio Grande Valley	1	*	95	10	44	Mexico (N/A)

\*The Hispanic/Latino market in Rio Grande Valley is the general market.  
Synnovate 2004, U.S. Census Bureau

## DID YOU KNOW?

- New York features the greatest diversity of Hispanics/Latinos: 31% are Puerto Rican; 17% Mexican; 13% Dominican.
- 80% of the teen population in Los Angeles is Hispanic/Latino.
- Miami/Fort Lauderdale boasts the highest Hispanic/Latino median household income — \$57,472 — followed by Chicago and San Francisco
- Hispanics/Latinos have predominated in San Antonio for two decades, with more than 21,000 businesses there.
- Hispanics/Latinos in San Francisco have the highest level of acculturation and speak English at work most frequently.
- The Rio Grande Valley has the highest percentage of Hispanic/Latino residents in the entire United States.

Sources: Synnovate 2004, U.S. Hispanic Market Report; *Multichannel News* 10/30/00; *Adweek* 11/00.

# HISPANIC/LATINO CONSUMER PROFILE: YOUNG AND INCREASINGLY AFFLUENT

The Hispanic/Latino market skews younger than the rest of the U.S. population, giving advertisers solid access to some of the most coveted demographic groups. In fact, about half of Hispanic/Latino males and females fall into the 20- to 49-year-old age bracket.

The median age for Hispanics/Latinos is nearly 10 years younger than the U.S. average. And with Hispanic/Latino birth rates increasing 75% over the last decade, the youth market is expected to continue thriving.

While the Hispanic/Latino median income is lower than the U.S. average, sources affirm that more Hispanics/Latinos are moving into the middle class (earning at least \$40,000). In fact, in the top 85 metropolitan areas in 2001, 14.3% of Hispanics/Latinos aged 18 to 34 earned household incomes of \$50,000 or more vs. 13.6% of the general population age 18 to 34 in the same 85 metropolitan areas.

Also, Hispanics/Latinos are an increasing proportion of the total affluent market (defined as adults with household incomes of \$100,000 or more). From 1991 to 2000, the growth of affluent Hispanics/Latinos rose 126%.

## KEY PROFILE POINTS

### Median Age

United States	35.9
Hispanic/Latino	26.7
Mexicans	24.2
Puerto Ricans	27.3
Central Americans	29.2
Dominicans	29.5
South Americans	33.1
Spaniards	36.4
Cubans	40.7

### Gender (%)

United States	50/50 M/F
Hispanic/Latino	51/49 M/F

### Median Household Income

United States	\$ 43,318
Hispanic/Latino	\$ 33,103

Source: *American Demographics*, October 2003

## DID YOU KNOW?

- The percentage of Hispanic/Latino households earning \$50,000+ per year is expected to increase 50% between now and 2005.

Sources: U.S. Census Bureau 2003; RAB Factbook (2001-2002); Sales & Marketing Management, 2001; Survey Buying Power; Tomas Rivera Policy Institute; American Baby Group, 2000; Synnovate 2004, U.S. Hispanic Market Report; Media Audit 2001

# HISPANIC/LATINO TEEN AND YOUTH MARKETS

Teens (12- to 19-year-olds), in general, are sought after as the ultimate consumers and creators of trends. The Hispanic/Latino teen influence is evident in virtually every product category from food to personal care to fashion.

A broad range of companies are playing to Hispanics/Latinos' preferences and purchasing power. For example, Procter & Gamble's Cover Girl successfully launched complementary make-up shades and modified ads (with Hispanic/Latino models and new branding lines) to target this young, important group. And, after conducting focus groups, Frito-Lay rolled out "Flaming Hot Corn Chips" — with Spanish and English packaging — expressly to satisfy Hispanic/Latino teens' spicier tastes.

The Hispanic/Latino culture pulses music and style with the same kind of impact as African-American-rooted hip hop. Additionally, marketers predict that Latin-influenced fashion will soon generate at least half the sales of the urban market (African-American, Hispanic/Latino and /or Asian-American). The focus on image is also core to their heavy consumption of beauty products.

## DID YOU KNOW?

- In 2020, the Hispanic/Latino teen market will balloon 62% larger than today — growing six times faster than the rest of the teen market.
- Today, Hispanic/Latino teens are 4.6 million strong — representing 20% of all U.S. teenagers.
- In 2000, 35% of Hispanics/Latinos were less than 18 years of age vs. 26% of the U.S. population.
- In 1998, Hispanics/Latino teens purchasing power was \$19 billion per year or \$320 per month — about 4% higher than non-Hispanic/Latino teens.

Sources: Marketing to Emerging Majorities, 2/02; Research Alert, 2000; *New York Times*, 4/15/01; Hispanic Market Statistics, 2000; Teenage Research Unlimited

# HISPANIC/LATINO MAGAZINE READERS

More than 70% of adult Hispanics/Latinos read magazines — about nine issues per month, the same as the U.S. average. Yet these adult Hispanic/Latino readers are significantly younger, which impacts income and the presence of children at home.

## COMPARISON OF THE HISPANIC/LATINO AND TOTAL U.S. POPULATION MAGAZINE READERS

	Hispanic/Latino Adults Read Magazines	Total U.S. Read Magazines
<b>MEAN AGE</b>	38	45
18 – 49	80%	62%
<b>MEAN HOUSEHOLD INCOME</b>	\$60,217	\$71,491
<b>EDUCATION</b>		
Attended High School or More	65%	87%
Attended College or More	31%	54%
<b>MARITAL STATUS</b>		
Married	53%	57%
Single	40%	35%
<b>ONE OR MORE CHILD &lt;18 AT HOME</b>	52%	36%

Source: Simmons NCS/NHCS Fall 2003

### DID YOU KNOW?

- Hispanic/Latino teens are easily reached via print — 59% of them are magazine readers.
- Hispanic/Latino teens bring great benefits to magazine advertisers: they have a strong affinity for brand names and tend to be more loyal and influential than non-Hispanic/Latino teens across several product categories.

Source: Simmons Market Research Bureau 2004; Teenage Research Unlimited; Telenacion; MRI Spring 2004; NCS/NCHS Fall 2003 Adults Full-Year Unified



# ADVERTISING TO THE HISPANIC/LATINO MARKET

The potential of the Hispanic/Latino market has advertisers dedicating major dollars to reach them – and those dollars are growing at a very significant pace. The variety of categories represented is also extensive — ranging from automotive to food to politics. Retail and direct response is the largest advertising category.

## TOP TEN ADVERTISING CATEGORIES — HISPANIC MEDIA VS. GENERAL MEDIA

Advertising Categories	Hispanic Rank	Hispanic Media Share	General Rank	General Media Share
Retail and Direct Response	1	31%	1	24%
Domestic Automotive	2	7%	3	7%
Telecommunications Services	3	7%	4	4%
Restaurants	4	5%	8	3%
Audio/Video Equipment	5	5%	16	2%
Nondomestic Automotive	6	5%	2	7%
Government	7	4%	17	2%
Beverages Nonalcoholic	8	4%	23	1%
Health Aids	9	4%	12	3%
Household Products	10	3%	22	1%

Hispanic Media includes: Spanish Language network TV: 3 networks; Spanish Language Cable: 1 network; Spanish Language Spot TV: 37 stations; Hispanic Magazines: 40 publications; Hispanic Newspaper: 58 publications.

Non-Hispanic/General Media includes: Network TV, Cable TV, Syndication, Spot TV, Network Radio, National Spot Radio, B-to-B Magazines, Consumer Magazines, Local Magazines, Sunday Magazines, National and Local Newspapers, Internet and Outdoor.

According to another source, the Association of Hispanic Advertising Agencies (AHAA), Hispanics/Latinos spend more on the following categories than the average U.S. consumer: baby products, personal electronics, personal care, beauty, cosmetics, food (out-of-home), apparel, home cleaning, food (at-home), beer, telecommunications and entertainment.

## DID YOU KNOW?

**Some of the top advertisers in the Hispanic/Latino market by industry are automotive, food and beverage, personal care and telecommunications. Why do they target Hispanic consumers?**

- Nearly 40% purchased a car in 2001 — and consulted an average of 4.2 sources.
- They spend 23% more on groceries than the average American household per year.
- Hispanics/Latinos spend \$21.3 billion on local, long-distance, wireless and Internet services.
- They are a huge driver of health and beauty aid sales — \$1.6 billion in mass stores.

Sources: AHAA; Marketing to Emerging Majorities, 2003; *Crain's Chicago Business*, 9/97; *American Demographics*, 2000; *People en Espanol* Hot Wheels and Hot Study, 2001; RCR Wireless News, 10/14/02; WWD, 8/31/01; *Hispanic Business* 12/02; CMR Hispanic Media Advertising Expenditure Analysis 2002

# TOP TEN MAGAZINE ADVERTISERS TO THE HISPANIC/LATINO MARKET

Many of the top spending brands targeting Hispanics/Latinos reflect the categories with the highest spending to this market, including: food and food products, retail, automotive, and toiletries and cosmetics. Additionally, these categories are well represented among the top magazine advertisers.

## TOP 10 ADVERTISERS TO HISPANICS/LATINOS

Company	2003 (\$ millions)
Procter & Gamble	80
Altria	61
General Motors	55
McDonald's	48
Sears, Roebuck & Co	42
Toyota Motor Co.	40
Americatel	39
Pepsi-Cola Co.	39
AOL Time Warner Inc.	37
Coca-Cola	35

Source: *Hispanic Business*, December 2003

## TOP 10 HISPANIC/LATINO MAGAZINE ADVERTISERS

Company	2003 (\$ millions)
Procter & Gamble	11
General Motors	7
Ford Motor Co.	6
L'Oreal USA, Inc.	3.6
DaimlerChrysler Corps	3.6
Toyota Motor Co.	3.5
Colgate-Palmolive Co.	2
Pfizer, Inc.	1.8
Kraft Food Holdings	1.8
Johnson & Johnson	1.6

Source: *Hispanic Magazine Monitor*

## TOP TEN HISPANIC/LATINO AD AGENCIES BY U.S. REVENUE

Based on the growth of the Hispanic/Latino market, many marketers are forging relationships with Hispanic/Latino advertising agencies to insure success. Recently, there has been an explosion both in the number of ad agencies and billings. The total revenue for the top ten agencies in 2002 was \$134 million. In 2003, revenue for the top ten rose to \$175 million.

Also of interest are the locations of these agencies — the top 10 can be found in the same locations as those with the highest Hispanic/Latino populations.

### TOP 10 HISPANIC/LATINO ADVERTISING AGENCY REVENUE 2003

Agency	Headquarters	2003 Revenue (\$ millions)	Percent of Change 2002–2003
Bromley Communications (Publicis)	San Antonio	\$ 32.90	10%
Bravo Group (WPP)	New York	31.8	14
Dieste, Harmel & Partners (Omnicom)	Dallas	23	37.7
Zubi Advertising Services	Coral Gables	16.4	10
La Agencia de Orci & Asociados	Los Angeles	14.2	n/a
Lapiz Integrated Hispanic Mktg (Publicis)	Chicago	12.4	11
Lopez Negrete Comm	Houston	12.1	50.7
Del Rivero Messianu DDB (Omnicom)	Coral Gables	11.2	12
Mendoza Dillon & Asociados (WPP)	Aliso Viejo	11	-14.7
Casanova Pendrill Publicidad (IPG)	Costa Mesa	10.7	11

Figures are *Ad Age* estimates.

Source: *Advertising Age*, April 19, 2004 "Annual Agency Report"

## SUMMARY

The Hispanic/Latino market has already influenced many facets of American culture. The impact of the market will likely increase, given its projected growth. As a result, advertisers and marketers will increasingly recognize the Hispanic/Latino population. However, as this group becomes more integrated into the mainstream, the means to reach it will evolve to reflect marketplace changes.

As more information becomes available, updates will be featured on the MPA website at [www.magazine.org/marketprofiles](http://www.magazine.org/marketprofiles). For additional copies of this document or for information on other MPA Market Profiles and resources, please contact MPA at [promotion@magazine.org](mailto:promotion@magazine.org).

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One of the most important challenges facing our industry today is ensuring that our workforce reflects the unprecedented diversity of American society. Magazine Publishers of America (MPA) promotes diversity and establishes initiatives with the goal of fostering a culture of inclusion within our own organizations, as well as within the industry at large.

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A photograph of three diverse professionals in business attire. On the left, a man with dark hair is partially visible. In the center, a woman with short, dark, curly hair is looking towards the right. On the right, a man with a shaved head and a goatee is also looking towards the right. They are all wearing professional clothing, including suits and blouses. The background is a plain, light-colored wall.

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