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The Journal of Spanish Language Media

The papers published in this inaugural issue of *The Journal of Spanish Language Media* were submitted from presentations at the first conference hosted by the Center on "Assessing the State of Spanish Language Media" November 8-10, 2007. We thank each of the authors for sharing their work in the inaugural issue of this new journal.

Please consider submitting your work for future issues of the journal. The Journal is open to all theoretical and methodological approaches, as long as the paper has some relationship to Spanish Language media, either in the United States, Latin America or Spain. Submissions must be in English.

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3. All authors must provide the following information: name, employer, professional rank and/or title, complete mailing address, telephone and fax numbers, email address.
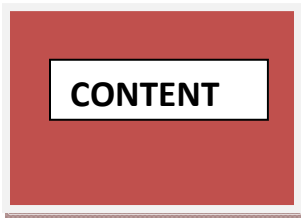
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The *Journal of Spanish Language Media*, depending on submission, to be posted on the website in January each year. To be considered, submissions should be submitted by September 1.

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ARTICLES

Trends in U.S. Spanish Language Television, 1986-2005:
Networks, Advertising, and Growth

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Introduction

The rapid emergence of dozens of foreign language television networks in the 1990s and early 2000s, along with the sheer diversity of languages, can be accurately characterized as a programming phenomenon. No fewer than 90 Spanish language networks, 20 Chinese language networks, and other cable network offerings in Russian, Korean, Tagalog, Vietnamese, Hindi, Bengali, Tamil, Arabic, and other foreign languages, now dot the multichannel landscape (Van Duyn, 2005; Vence, 2005; Wallack & Ning, 2005; Winslow, 2005). Some are directly imported signals, some are an amalgamation of several foreign networks, and others offer original programming produced in the United States. The largest U.S. cable system operator, Comcast, offers 90 foreign language programming options alone (Vence). These figures do not include many of the local broadcast stations, local cable programming, and low-power television stations producing foreign language programming. Some of these local stations offer programming in multiple languages, such as San Francisco's KTSF 26 and Los Angeles' KSCI 18, which target Asian Americans in 12 and 13 languages, respectively (KSCI, 2006; KTSF, 2006a).[1] These stations and networks illustrate a trend in television segmentation strategy in an increasingly multicultural and linguistically diverse United States.

More than any other language in the U.S., Spanish language television programming is being embraced by advertisers as a new form of market segmentation. The first quarter of 2006 alone showed a 14.9% increase in Spanish language ad spending (TNS Media Intelligence, 2006a). Within just the television industry, Hispanic broadcast television expenditures increased 15% from 2002-2003, compared to a 2% increase for all other broadcast television (Multichannel News, 2004). The influx of revenue from advertisers, coupled with an increased supply of foreign language content from U.S. television programmers, shows that both groups have made a decision to invest in foreign language programming and, moreover, that they somehow view this market segment as valuable. It is worth exploring the patterns and trends that led to this growth

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[1] KTSF and KSCI also happen to be distributed nationally by U.S. cable and satellite providers. This is not the case for all local foreign language stations, however.

phenomenon in foreign language television programming, and Spanish language television in particular.

Purpose of Study

The objective of this secondary data analysis was to describe the landscape of foreign language programming in the United States over a 20-year period (1986-2005), the majority of which is Spanish language programming. The analysis identified patterns in the growth and development of the foreign language audience, the foreign language television industry, and advertiser support of this industry over the same period. As described below, it also shed light on the longitudinal relationship between these audiences and the advertising and programming industries.

A descriptive analysis of secondary data was undertaken to test the following research questions:

RQ 1**:** How does the growth rate of the supply of Hispanic networks compare to the growth rate of the U.S. Hispanic population?

RQ 2**:** How does the growth rate of the U.S. Hispanic population compare to the growth rate of advertising expenditures on Hispanic networks?

RQ 3**:** What is the proportion of Spanish speakers to the number of Spanish-language networks available, and how has this changed over time?

RQ 4**:** How does the growth rate of the U.S. Hispanic household median income compare to the growth rate of advertising expenditures on Hispanic networks?

Methodology

Bivariate correlations and the graphical depiction of census and industry data were used to discover the relationships between consumer demand and programming supply by analyzing (a) foreign language programming supply and advertiser expenditures, and (b) linguistically isolated groups and foreign language programming supply within the United States. General descriptive data also were generated and graphed in order to track the growth and development of various linguistic groups within the United States, language use patterns and linguistic isolation, the growth and development of foreign language networks, and the growth and trends in foreign language advertising. The advertising data were generously supplied by TNS Media Intelligence, while the network growth data were obtained from the *Television and Cable Factbook Online, Multichannel News*, and Web sites of the two direct broadcast satellite programming distributors (DirecTV and DISH Network).

Challenges arose in two areas of this secondary data collection process: the nature of the Spanish language network advertising data available and the time span sought, 1986-2005. First, the Spanish television network data gathered by TNS Media Intelligence is not exhaustive. While TNS monitors Univision and Telemundo affiliate stations across the country, it only began monitoring one cable network, Univision-owned Galavision, in 2002. This measurement of one cable network excludes the majority of Spanish language networks now available to viewers. In

addition, three data points (2002-2005) do not provide sufficient information to interpret trends. For these reasons, Hispanic cable data (Galavision's) were not analyzed. However, it is worth noting that Univision controls the vast majority of the advertising market for Spanish language television in the United States. To wit, about 70% of all advertising dollars spent on Hispanics are spent on Spanish language television, and of that, approximately 93% goes to Univision and its sister networks, including broadcaster Telefutura and cable network Galavisión (Crowe, 2004).[2] Therefore, while the majority of current Spanish language cable networks are not represented in the data set used for this study because they were not monitored[3], the bulk of Spanish language television advertising revenue is accounted for by the broadcast networks (Univision, Telemundo, and Telefutura) and cable network (Galavisión) monitored by TNS.

The third limitation, the time span sought, affected Spanish language programming data. While Univision has been in existence since 1961 and other networks since the 1980s, measurement of Spanish language advertising trends has not occurred consistently over time. In 1995-1996, TNS did not measure Spanish language network and spot advertising revenue separately; it began doing so only in 1997 (M. Ray, personal communication, July 14, 2006). Secondly, the agency monitored only the Top 75 designated market areas (DMAs) from 1997-2001 and expanded its measurement to the Top 100 DMAs in 2001 (M. Ray, personal communication, July 14, 2006). For consistency, only the Top 75 DMAs were used for this longitudinal analysis in order to maintain the same comparison base.[4]

There were 27 measured Spanish language stations among the Top 75 DMAs in 2000. The total number of measured Spanish language stations in 2001 (when this measurement encompassed the Top 100 DMAs) increased to 29. The difference between the Top 75 and Top 100 DMAs for Spanish language data for the time period studied was just two markets: El Paso and Waco. (El Paso and Waco are in the Top 100 but not the Top 75 DMAs.) Due to the limitations of time, complete longitudinal analyses could not be conducted on some questions for the years 1986-2005. Instead, analyses were conducted for the periods 1995-2005, 1997-2004, or 2001-2005 only, depending on the analysis.

Findings

Population, income, television advertising, and television network growth were examined using data supplied by the U.S. Census Bureau and TNS Media Intelligence. The goal was to track trends and identify patterns among these variables in order to understand the growth of foreign language television programming in the United States and the conditions surrounding that growth.

U.S. Hispanic Population and Television Network Growth
This descriptive analysis was conducted for the years 1986-2004, since the 2005 population figures were projections only (see Table 2, Table 3, Figure 1, Figure 2). Separate analyses were conducted at (a) the network level and (b) the local (spot advertising) level for

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[2] It is worth noting that there are two non-Spanish language networks targeting Hispanics. These are the cable networks SíTV, which programs in English, and mun[2], which targets bilingual Hispanics with both English and Spanish programming. The ABC network has done some selective targeting of English-speaking Hispanics with single programs such as *The George Lopez Show*, *Freddy,* and *Ugly Betty*.

[3] Networks not available for analysis include networks such as CNN en Español, FOX Sports en Español, Gol TV, VH Uno, and MTV Tr3s. These networks were not monitored by TNS Media Intelligence as of 2005.

[4] Markets 76-100 figures were thus removed for years 2001 and beyond for analysis and graphing purposes, so that trends for a common 1997-2004 period could be observed across several variables.

Spanish language television, using the Top 75 markets monitored by TNS from 1995-present, in order to identify trends within the 1995-2004 period. Both analyses utilized the same census population data. The data showed correlated growth (see Figure 1, Figure 2). However, while growth of the U.S. Hispanic population was fairly steady at 3%-4% for the period, the number of Hispanic networks saw much greater growth rates during this same period, usually in double digits. Hispanic network growth outpaced total cable network growth for 1994-2004, as seen in Figure 3.[5] The rapid population growth of the Hispanic demographic compared to other ethnic demographics is also evident. A bivariate correlation of 0.920 was found between the size of the U.S. Hispanic population and the number of Hispanic networks from the period 1986-2004 (see Table 4).

The shape of the correlation between the growth of the U.S. Hispanic population and the number of Hispanic networks suggests that the population and number of networks maintained a steady and parallel path until the mid-1990s. However, the number of Hispanic networks sharply increased after this point, and indeed their rate of growth outpaced that of the Hispanic population. While the Hispanic population grew steadily at 3%-4% annually through the 1990s, the number of new Hispanic networks grew by anywhere from 20%-55% during a given year beginning in 1995 (see Table 2). More revealing is the percent change in growth from 1986-2004. While the Hispanic population grew by nearly 116% (19 million to 41 million), the number of Hispanic networks grew by 2400% during the same period (3 to 75), indicating a much faster rate of growth than the Hispanic population (see Table 2).[6] A listing of the Hispanic networks and their respective launch dates can be found in Table 5. This latest accounting finds 92 Hispanic-targeted networks in the United States, with all but two broadcasting in Spanish (see Table 5). RQ1 is restated and answered:

RQ1: How does the growth rate of the supply of Hispanic networks compare to the growth rate of the U.S. Hispanic population?

The growth rate of Hispanic networks outpaced that of the U.S. Hispanic population. The shape of Figure 1 does suggest, however, that the population was growing at a slightly greater rate than the networks. This is logical in that it is important to recognize a potential audience or consumer base before creating television networks that target it. Figure 1 shows that the Hispanic population was growing steadily, and Hispanic network growth accelerated later (around 1995-1996). This steady population growth followed by rapid media product development is also indicative of a latent demand among advertisers for the new Hispanic audience. Programmers must have sensed a latent demand among advertisers before taking the initial risk of creating Hispanic-targeted programming.

Major events in the Hispanic programming industry and in the United States during this time period offer likely reasons for the differences in growth between the Hispanic population and networks. In late 1992, Nielsen Media Research began measuring Hispanic audiences, introducing its Nielsen Hispanic Television Index or NHTI, which provides separate

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[5] Note that the variables within Figure 3 have all been scaled to fit within the same graph in order to compare slopes and growth patterns. Thus, the actual numbers reflected on each axis may not reflect the true quantitative value of each variable presented.

[6] It is important to acknowledge that the percent change is likely to be large when the base number is small (such as three networks). Rapid growth during the initial stage of an industry is not uncommon. Nevertheless, the 2400% growth rate in the number of networks for the period 1986-2004 far outpaces the growth rate of the Hispanic population (116%) for that period.

measurement of Spanish language television and Spanish language audience viewing habits in the U.S. (Nielsen Media Research, 2006c). Since research indicates that advertisers and programmers value accurate measurement, it would follow that this new measurement tool would have helped legitimize Spanish language programming to would-be investors, whether they were programmers or the advertisers necessary to support such programming. Since the steady growth in the number of Hispanics began in 1996, this 4-year period following the NHTI's introduction would have been adequate time for media managers to recognize the value of a separate ratings index for Hispanic audiences and to launch new networks in response. As seen in Table 5 and Figure 1, the growth in Hispanic networks was steady, with the largest gains occurring in the years just prior to 2004.

While a couple of networks launched in the early 1990s, the real growth spurt seems to have arrived in 1996. From that year forward, sustained growth was observed at the rate of two, six, and even 10 new Hispanic networks per year through 2000. It may be that the brand recognition of some of the new networks' parent companies influenced other programmers and advertisers to test the waters. The debut of CNN en Español, FOX Sports en Español, and Discovery en Español from 1996-1998 likely signaled to other programmers that Spanish language television was a safe move, that it had been officially embraced and validated by leaders in the multichannel industry.

Finally, the release of 2000 U.S. Census data indicating that Hispanics had surpassed African Americans as the largest minority group in the United States undoubtedly served as a wake-up call to advertisers and programmers, particularly those not yet actively marketing to or doing business with Hispanics. This news was released in 2002, the same year in which there was a second sharp upturn in the number of new Spanish language networks (see Table 2, Figure 1). While in 2002 there were 41 Hispanic-targeted networks, 2 years later in 2004, there were 75, an increase of 83%. Local Hispanic station growth experienced a similar spike in 2002 (see Table 3, Figure 2). The U.S. Census Bureau news release serves as a possible explanation for this sharp growth. As Cartagena (2005) notes, this demographic event "caused many in the business world to rethink their attitudes toward the Latino community" (p. xiii). While a causal relationship cannot be proven without asking advertisers directly why they invested in 2003, the census news seems a likely explanation for the phenomenon, given the timing.

Hispanic Population and Spanish Language Station Growth

The relationship between the U.S. Hispanic population and local Spanish language stations was also examined, but for the period 1995-2004, since 1995 was the earliest date TNS affiliate data were measured and available for analysis (see Table 3). However, data points were used every other year (1995, 1997, 1999 2001, and 2003).[7] This relationship was found to be similarly directional, with a correlation of 0.945 (see Table 4); however, the graphical depiction of the two variables remains evenly paced for a longer period of time (see Figure 2). A slight uptick in local Spanish language station growth is observed in 1998 and again in 2002. In these years, the number of local Hispanic stations grew by six and 12 stations, respectively (see Table 3). It is important to note one additional factor regarding the local stations. Not only did new local Spanish language stations enter the marketplace, but existing local stations changed their language formats from English to Spanish. This is referred to as "organic growth" (M. Ray, personal communication, July 14, 2006).[8] Again, growth since 2002 may be a response to the

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[7] TNS only noted the appearance of new stations every other year in its raw data.
[8] However, TNS data do not distinguish between organic station growth and new station growth.

release of the U.S. Census data, which seems to be confirmed by the advertisers' own responses in terms of timing.

While acknowledging this correlation between Hispanic population size and number of Hispanic networks, a comparison of other population demographics and network growth trends suggests that the Hispanic correlation between demographic group size and number of networks may not be automatically important (see Figure 3). The U.S. White (non-Hispanic) population was plotted for the years 1994-2004, along with the total number of television networks within the U.S. market. While the White population remained fairly stable, the number of U.S. television networks[9] exploded between 1995 and 1996, likely due to enhanced technologies and additional cable system channel capacity. While the number of general market networks certainly outpaced the number of Hispanic networks, it was the rate of growth on the Hispanic networks that beat out the general market. While the total number of cable networks grew 266% from 1994-2004 (from 106 to 388), the number of Hispanic networks soared 971% (from 7 to 75) for the same period (FCC, 1994-2004; see Figure 3). This suggests that while size of a demographic is related to network growth, there must be other factors that help to explain such a phenomenon as the Hispanic network growth rate.

In sum, the size or population of the U.S. Hispanic population and the number of Hispanic networks in the United States are related. This relationship also holds true between U.S. Hispanic population and local Hispanic station growth. The shape of Figure 1 does suggest, however, that the population was growing at a slightly greater rate than the networks. This is logical in that it is important to recognize a potential audience or consumer base before creating television networks that target it. Figure 1 shows that the Hispanic population was growing steadily, and Hispanic network growth accelerated later (around 1995-1996). This steady population growth followed by rapid media product development is also indicative of a latent demand among advertisers for the new Hispanic audience. Programmers must have sensed a latent demand among advertisers before taking the initial risk of creating Hispanic-targeted programming.

Hispanic Population and Hispanic Advertising Expenditures

This analysis examined the relationship between the growth of the U.S. Hispanic population and the growth of advertising expenditures for Hispanic television. As noted in the beginning of this section, the Top 75 Designated Market Areas were analyzed. The analysis was conducted for broadcast television on three levels for the period 1997-2004. It first examined the relationship between population and (a) total Hispanic advertising revenue, (b) spot advertising revenue, and (c) network advertising revenue.

Advertising data reveal rapid revenue growth for the period 1995-2004 in comparison to the growth rate of the U.S. Hispanic population (see Table 6, Figure 4). At all time points within the period measured, total Hispanic advertising expenditures grew at a much greater rate than did the Hispanic population. While the U.S. Hispanic population hovered between 3% and 4% annually from 1995-2004, percentage growth for total advertising revenue for all years except one was in the double-digits, for instance 14% or 29% annual growth. A nearly perfect

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[9] Because there are no known "White-targeted" networks, the total number of U.S. networks was used as a comparable measure instead. These network figures were compiled from the FCC's annual video competition reports, 1994-2004, the years for which comparable data were available. The figures represent all networks that were available via satellite delivery. Also, while it would have been desirable to include a comparison of the U.S. Asian population and Asian-targeted networks as well, launch dates for most Asian networks were not available and thus could not be graphed.

correlation exists (.979) between the growth of the U.S. Hispanic population and the growth of Hispanic advertising revenues (see Table 4, Figure 4).

Advertising revenue growth rates at the spot and network levels showed similar patterns[10] (see Table 7, Figure 5, then Table 8, Figure 6). While the U.S. Hispanic population grew 41.6% from 1997-2004, Hispanic spot television advertising revenue grew 124.5% and Hispanic network television advertising grew 205.5%.[11] In both cases but particularly the network advertising revenue comparison, Hispanic revenue experienced a steady climb in advertising revenue, where the general market revenue performance was more volatile.

The shape of the growth curves in Figures 4, 5, and 6 are similar to the shape of Figures 1 and 2, and for good reason. Programmers are dependent upon advertisers to support new programming ventures. If new programming has launched, it has launched because its studio and producers feel secure in the potential income from advertising inventory offered within that programming. Without sufficient levels of advertising revenue, a given program cannot survive in the dual product marketplace. As discussed earlier, one likely catalyst for advertiser confidence was the release of 2000 Census data, which indicated that Hispanics had surpassed African Americans as the largest minority group in the United States. When this milestone occurred in 2002, it received substantial press coverage. This news gave Hispanics greater visibility and consumer clout than they had previously enjoyed, and they began receiving more attention from advertisers (Cartagena, 2005).

Finally, Hispanic television advertising data were compared with general market television advertising data for the same time period, 1997-2004[12] (see Figure 7, Figure 8, Figure 9). Hispanic television revenues grew at a more rapid pace than did general television market revenues at all three levels of comparison: total broadcast television revenue, spot television revenue, and network television revenue. While Hispanic spot TV advertising revenue increased 124.5% from 1997-2004, the general market spot TV category decreased 1.5%. Similarly, while Hispanic network TV advertising grew 205.5% for that period, general market network TV advertising revenue grew just 24.8%. Finally, total Hispanic TV advertising revenue grew 175% for the period 1997-2004, while total general market advertising revenue grew just 12.2%.

A few observations are worth noting when comparing the Hispanic and general television markets for the period studied.[13] First, while network and total broadcast television revenue in the general market slipped in 2001 due to 9/11, Hispanic television revenue continued to grow steadily (see Figure 7, Figure 9). Second, while total Hispanic television revenue and total Hispanic network revenue grew steadily from 1997-2004 and did not seem to have been affected by the general advertising drop-off of 2001, Hispanic spot revenue *did* experience a drop-off similar to that of the general market (see Figure 8). However, after this decline for 2001,

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[10] One exception occurred in the spot revenue category in 2001, when it registered a 12.2% drop. A slowing was noticeable in the total advertising revenue as well (Table 7). Both are likely due to the advertising revenue drop-off from the economic recession (Hall, 2003) and 9/11. Most advertisers in 2001 experienced a drop in 2001 revenue for this reason. Hispanic network television advertising revenue held steady throughout the 9/11 drop-off experienced by so many others. It appears that the strong growth in this area was enough to cushion Hispanic networks from the falloff.

[11] These high growth rates in advertising revenue are likely related to the growth in the number of Spanish language affiliates and networks for the same period. More stations and networks means more advertising inventory available for purchase.

[12] In the interest of maintaining the same comparison base of the Top 75 DMAs, the years 1997-2004 were used.

[13] Because insufficient data existed to perform comparable analyses with Hispanic cable television, these secondary data analyses focus solely on Hispanic broadcast television. The majority of Hispanic television revenue is actually within broadcast television (Univision and its properties).

Hispanic spot market revenue quickly recovered and in fact grew at a sharper rate than did general market spot revenues (see Figure 8).

Finally, a slightly higher rate of growth can be observed for Hispanic advertising revenues at all levels of analysis (total revenue, spot revenue, and network revenue) compared to the general market from 2001-2004 (see Figure 7, Figure 8, Figure 9). This is likely due to two factors. As previously noted, the release (as well as anticipated release) of U.S. Census figures in 2002 likely played a role in this growth. News of this consumer group's size, combined with much media coverage, likely spawned even more advertiser interest and stimulated further advertising sales. This is not an effect that would have occurred immediately, but one that would have gained momentum as news of the Census data spread, causing advertisers to process this information and gradually make advertising investment decisions. Secondly, the sharp increase in revenue growth coincided with the sharp increase in Hispanic network growth from 2002 onward, as previously noted. The increased Hispanic advertising inventory for those years made greater investment levels possible, again suggestive of latent demand that could finally be satisfied with the arrival of Hispanic television vehicles. Research question 2 is restated and answered:

RQ 2: How does the growth rate of the U.S. Hispanic population compare to the growth rate of advertising expenditures on Hispanic networks?

Hispanic network and local station advertising revenue growth outpaced the growth rate of the U.S. Hispanic population. These advertising growth rates also outpaced those for the general market.

Linguistically Isolated Spanish Speakers vs. Spanish-Language Networks
Linguistic isolation was measured in each of the 1980, 1990, and 2000 censuses. This construct was measured on the level of individual language in each year except for the 1990 census, where linguistic isolation was reported by language group instead of individual languages. For instance, "Asian or Pacific Island languages" was reported instead of Chinese, Korean, Japanese, etc. Thus, *language group* linguistic isolation could be measured for all three censuses 1980-2000, but individual language linguistic isolation data could be analyzed only for the 1980 and 2000 censuses. Since the Spanish language is its own group, its measurement is not affected as is the measurement for Asian and Pacific languages. It is no surprise that the number of linguistically isolated persons within the Hispanic population is quite high, and in fact there is a 0.988 correlation for the period 1980-2000 (see Table 4).

The number of linguistically isolated Spanish speakers was then compared to the number of Hispanic networks available in the United States. The analysis was conducted for the years 1980, 1990, and 2000. Data graphically revealed that the U.S. Hispanic population grew at a higher rate than did the proportion of linguistically isolated Hispanics. Similarly, the number of Hispanic networks grew at a faster pace than did the *percentage* of Hispanics who were linguistically isolated. An explanation for these relationships will be addressed shortly.

Not surprisingly, analysis showed that the number of linguistically isolated Spanish speakers and the number of networks were correlated (0.903; see Table 4). The proportion of linguistically isolated persons within the Hispanic population[14] doubled between 1980 and 1990

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[14] This population, by definition, includes all Hispanics, including bilingual Hispanics and Hispanics who only speak English.

from 18.5% of Hispanics to 37.2%, and increased slightly further in 2000[15]. These numbers became even higher when examining linguistic isolation levels within just the *Spanish-speaking* Hispanic population[16]; about half of the Spanish-speaking population in the United States is linguistically isolated, or speaks English less than very well.

A revealing and somewhat surprising picture emerged after examining the percentage of each language group linguistically isolated in 1980 and 2000. In almost all cases, the relative *proportion* of a language group within the U.S. population considered linguistically isolated actually decreased from 1980 to 2000. That is, of the total number of speakers of a given foreign language within the U.S., the percentage considered linguistically isolated (speaking English less than very well) decreased from 1980-2000.[17] What this suggests is that while the sheer number of linguistically isolated U.S. residents has dramatically increased from 1980-2000, this increase is not due to a personal choice to abstain from using or learning English any more than might have been the case in 1980. Rather, it suggests that the increase in linguistic isolation in the United States stems primarily from the larger number of non-English speakers now residing in the U.S., as well as any children born to these non-English speakers.[18] Thus, while the size of the linguistically isolated population in the United States increased from 4.8% to 8.1% between 1980-2000 in terms of raw numbers (Shin & Bruno, 2003), the relative percentage of foreign language speakers considered linguistically isolated has decreased overall.

Research question 3 can be answered:

RQ3: What is the proportion of Spanish speakers to the number of Spanish-language networks available, and how has this changed over time?

Data graphically revealed that the U.S. Hispanic population grew at a higher rate than did the proportion of linguistically isolated Hispanics. Similarly, the number of Hispanic networks grew at a faster pace than did the *percentage* of Hispanics who were linguistically isolated. It stands to reason that the increased size of the linguistically isolated population in the U.S. would produce an increased demand for foreign language television programming, and in fact the number of networks did expand between 1980 and 2000. During this period, the number of Spanish language television networks increased from two in 1980 to five in 1990, and to 33 in 2000. The growth rate for television networks was far greater than the growth rate of linguistically isolated Spanish speakers for this 20-year period. Moreover, despite little or no change in the proportion of linguistically isolated Spanish speakers from 1980-2000, the number of Hispanic networks kept growing. As mentioned above, however, the sheer population of linguistically isolated persons did increase substantially from 1980-2000. It is possible that this analysis indicates a delayed effect of network and station growth, where programmers were trying to catch up with the growing Spanish-speaking population during the 1980-2000 period.[19]

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[15] Linguistic isolation measures include persons five years of age and older by operational definition of the U.S. Census Bureau.

[16] The percentage becomes higher because the population in the denominator becomes smaller. (The number of Spanish-speaking U.S. Hispanics is smaller than the total number of U.S. Hispanics.)

[17] Only two languages increased in terms of the percentage of persons linguistically isolated: Polish and Russian.

[18] Note that children residing in a linguistically isolated household are also considered linguistically isolated, by definition of the U.S. Census Bureau.

[19] Examination of the same trends for local television stations (Spanish-language network affiliates) was not carried out due to insufficient data.

An additional longitudinal analysis was conducted to compare and contrast the major foreign languages spoken in the United States, as well as the numbers of linguistically isolated persons from each linguistic group in 1980 and 2000. Increases are substantial for all languages due to the 10-year gap between data points; however some trends are apparent. Asian languages witnessed the highest percentage increase in the number of persons linguistically isolated from 1980-2000, with Vietnamese, Chinese, and Korean speakers increasing 354%, 209%, and 203%, respectively. The number of linguistically isolated Spanish speakers increased by about 146% from 1980-2000.[20] The increased rates of linguistically isolated persons is likely due in part to the increased immigration rates discussed previously and the sheer number of persons emigrating to the United States in 2000 (and granted entry) compared to 1980. Whatever the reason, these increased numbers of linguistically isolated persons point to an increased consumer base—and demand—for foreign language programming.

Therefore, this analysis can be summarized by noting that the number of linguistically isolated Spanish speakers and the number of networks were related; both variables experienced robust growth between 1980 and 2000. However, while the sheer number of linguistically isolated persons in the United States increased, the proportion of linguistically isolated individuals within each language group, overall, did not. In sum, it is the greater quantity of linguistically isolated persons, in raw numbers, that is increasing demand for foreign language television programming in the United States.

A Converged View of the Data

A converged graph containing data for these variables, adjusted proportionally for comparison purposes, is displayed in Figure 10. Examination of the trends[21] of the variables indicates sharper rates of growth for some variables, and stable growth rates for others. Without exception, the Hispanic television market growth outpaced general market growth (see Figure 10). From 1997-2004, Hispanic advertising revenue in total, as well as on the network and affiliate (spot) level, grew faster (205.5% increase) than general market television advertising revenue (24.8% increase). Moreover, growth of Hispanic networks and advertising revenue outpaced that of the Hispanic population and Hispanic household income for the period. While population increased albeit at a slower rate than the networks and advertising revenue, household income remained stable and even declined slightly for the period.[22] This suggests that advertisers and programmers are not as concerned about Hispanic population growth or household income, or are not concerned about it enough to alter their investment and network launch plans subject to population or income trends for the period studied. They are investing in future markets. Research Question 4 is restated and answered:

RQ4: How does the growth rate of the U.S. Hispanic household median income compare to the growth rate of advertising expenditures on Hispanic networks?

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[20] Other languages likely witnessed increasing rates of linguistic isolation also, however in some cases data were not available for one of the end points, 1980 or 2000.

[21] Linguistic isolation data could not be plotted because only one data point was available for the same time period (1997-2004).

[22] Hispanic household income increased 16.4% overall from 1995-2003, but experienced declines from 2000-2003. During these latter years, it does not appear that advertisers changed their investment behavior or attitude toward the Hispanic market.

Growth rate for Hispanic advertising revenue outpaced that of U.S. Hispanic household income for the period studied. Since audience size and household income have long been reliable predictors of audience valuation, these findings challenge previously held notions. If Hispanic networks and Hispanic advertising revenues grew dramatically while Hispanic household income and audience size remained stable (see Figure 3), this seems to indicate that other factors must carry greater importance to advertisers and programmers, at least when it comes to the U.S. Hispanic audience,[23] and may be further evidence of latent demand and advertisers' desire to find ways of strategically sheltering themselves from direct competition. A secondary explanation may be that, once advertising investment and network launches began to occur more frequently, a certain level of industry hype or excitement kept these high growth rates in place for the duration of the period, despite the reality of flat growth rates for audience size and household income.

Additional analysis of advertising revenue and network growth provides useful comparisons within the Hispanic television market. The number of Hispanic networks and Hispanic network advertising revenue grew the fastest of all variables measured; these two factors were also highly correlated (see Figure 10). This is logical since an increase in the number of Hispanic networks would increase supply of advertising inventory to be sold. Similarly, in order for the number of networks to expand, financial support must be in place or at least anticipated. Advertising revenue and network inventory are codependent. The graphing lines of these two factors clearly indicate their high level of correlation, as well as their rapid growth rate in comparison to the other factors measured. The number of Hispanic affiliates also grew during this period, but at a somewhat lower rate than the Hispanic networks.

The converged graph (Figure 10) also indicates that while the general television market took a hit in 2001 in terms of advertising revenue, the Hispanic television market barely felt the effects of a 9/11 advertising drop-off. Total advertising revenue for the Hispanic market remained relatively stable, while the general market experienced a decline. Spot television advertising revenue for both the general and Hispanic markets, however, did show declines for 2001.

Summary of Secondary Data Analysis Findings

The trends in increased Hispanic television programming, advertising revenues, and advertising inventory from 1986-2005 are reflective of the growing U.S. Hispanic population in the United States, but in fact outpace Hispanic population growth. New Hispanic networks and affiliates showed the highest rate of growth among the variables, exceeding even advertising revenue growth.[24] The results of these research questions, taken together, suggest that when demographic groups—and particularly linguistic groups such as U.S. Hispanics—experience prolonged and steady population growth, an increase in programming serving that audience is also likely, as are increased advertising inventory and revenues to support that programming. This is also indicative of the laws of supply and demand. In competitive markets, increased market demand is met by an increase in supply. Here, it appears that supply exceeded demand, at

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[23] These additional "importance" factors were tested in this study. Findings are reported in the Audience Valuation Findings section.

[24] This is likely due to the effect caused by any increase to a small "base number." Any variable that begins with low values will display high rates of growth. Given that not many Hispanic networks or affiliates existed early on, high growth rates and graph lines were the result when even a few Hispanic networks or affiliates were added to the mix.

least in terms of growth rate. It seems that latent demand may have been well in place, in that program producers were anticipating advertisers' needs and desires, and decided to supply the language-specific products to satisfy latent demand. Linguistic isolation, the data suggest, also appears to be a key driver of advertiser support for new networks and programming targeting non-English speakers.

The data indicate favorable and investment-oriented attitudes toward the Hispanic market by television advertisers and programmers from 1997-2004. Hispanic television advertising revenue growth outpaced that of the general television market for the period, even thriving throughout the 2001 advertising drop-off experienced by the media industry at large. Increased prices for Hispanic television inventory (as indicated by higher revenue than inventory growth rates) also indicate that demand for access to Hispanic audiences has increased. Finally, while Spanish-language television programming is the most monitored and most prominent example of foreign language programming growth in the United States, other foreign language programming and advertising growth is also occurring and should be expected, given the growth levels of population and linguistic isolation of other demographic groups monitored by the U.S. Census Bureau. In sum, this analysis indicates that population and audience growth, linguistic isolation, network growth, and local television station growth are related to advertisers' increased investment in foreign language audiences in the United States, the majority of which are Spanish language. These increased investment levels indicate a growing valuation of foreign language audiences by television advertisers.

Table 1

Linguistically Isolated Households* in the U.S.

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Language	Well	Not Well	Not at all	Total Linguistically Isolated
		Level at which English is Spoken in Household		
Spanish	5,819,408	5,130,400	2,801,448	13,751,256
Chinese	595,331	408,597	1,625,526	1,166,454
Vietnamese	340,062	270,950	56,021	667,033
Korean	268,477	228,392	36,028	532,097
French	269,458	138,002	7,578	415,038
Russian	209,057	148,671	43,623	401,351
Tagalog	311,465	79,721	5,496	396,682
Italian	195,901	99,270	11,979	307,150
German	219,362	79,535	4,719	303,616
Polish	167,233	95,032	17,455	279,720
Portuguese	125,464	90,412	28,311	244,187
Japanese	146,613	84,018	5,659	236,290
Arabic	140,057	58,595	12,533	211,185
French Creole	121,913	70,961	14,637	207,511
Persian	70,909	32,959	10,176	114,044
Greek	65,023	33,346	4,216	102,585
Armenian	48,469	31,868	13,817	94,154
Urdu	56,736	20,817	5,329	82,882
Gujarathi	50,637	22,522	7,818	80,977
Hindi	51,929	16,682	3,254	71,865

*Defined for purposes of this table as households that do not speak English at or above the level of "very well."
Source: U.S. Census Bureau, Summary Table 3. Adapted from Shin, H.B. & Bruno, R. (2003). "Language Use and English-Speaking Ability: 2000."

Table 2

U.S. Hispanic Population vs. Number of Hispanic Networks

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Year	Hispanic population	Hispanic networks	Growth rate (%) Hispanic population	Growth rate (%) Hispanic networks
1986	19,154,000	3	Not applicable	Not Applicable
1987	19,946,000	5	4.1	66.0
1988	20,786,000	5	4.2	0.0
1989	21,648,000	5	4.2	0.0
1990	22,379,000	5	3.4	0.0
1991	2,339,100	6	4.5	20.0
1992	24,283,000	7	3.8	16.7
1993	25,222,000	7	3.9	0.0
1994	26,160,000	7	3.7	0.0
1995	27,170,000	7	3.9	0.0
1996	28,099,000	10	3.4	42.9
1997	29,182,000	12	3.9	20
1998	30,252,000	18	3.7	50
1999	31,337,000	28	3.6	55.6
2000	35,306,000	33	12.7	17.9
2001	37,060,000	36	5	9.1
2002	38,277,000	41	3.8	13.9
2003	39,902,000	60	3.7	46.3
2004	41,322,000	75	3.6	25
% Change, 1986-2004	115.7%	2400%		

Sources: U.S. Census Bureau; *Multichannel News* (Oct 17, 2005); Television and Cable Factbook Online, DirecTV, and Echostar.

Table 3

U.S. Hispanic Population vs. Number of Hispanic Affiliates

Year	Hispanic population	Hispanic affiliates (Top 75 DMA)	Growth rate (%) Hispanic population	Growth rate (%) Hispanic affiliates
1986	19,154,000	Not available	Not applicable	Not applicable
1987	19,946,000	Not available	4.1	Not applicable
1988	20,786,000	Not available	4.2	0.0
1989	21,648,000	Not available	4.2	0.0
1990	22,379,000	Not available	3.4	0.0
1991	2,339,100	Not available	4.5	20.0
1992	24,283,000	Not available	3.8	16.7
1993	25,222,000	Not available	3.9	0.0
1994	26,160,000	Available	3.7	0.0
1995	27,170,000	16	3.9	0.0
1996	28,099,000	16	3.4	42.9
1997	29,182,000	21	3.9	20
1998	30,252,000	21	3.7	50
1999	31,337,000	27	3.6	55.6
2000	35,306,000	27	12.7	17.9
2001	37,060,000	29	5	9.1
2002	38,277,000	29	3.8	13.9
2003	39,902,000	41	3.7	46.3
2004	41,322,000	41	3.6	25

% Change,
1986-2004   115.7%   156%

Sources: TNS Media Intelligence, U.S. Census Bureau

Table 4.

Correlations[25]

Relationship	RQ	Correlation	*N*
HisPop/HispNets	1	.920	19
HisPop/Affils	1	.945	5
HisPop/TotalHispRev	2	.979	8
HisPop/SpotHispRev	2	.954	8
HisPop/NetHispRev	2	.977	8
HisPop/HispCableRev	2	.889	3
HisPop/LIspkrs	3	.988	3
LIspkrs/HispNets	3	.903	3
HispInc/HispTotRev	4	.790	9
HispTotAdRev/HispTotSec	5	.957	11
HispSpotAdRev/HispSpotSec	5	.976	9
HispNetAdRev/HispNetSec	5	.953	9

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[25] A standard correlation table could not be used for this analysis due to the data limitations previously mentioned, thus exhaustive correlations could not be uniformly run on all variables.

Table 5.

Hispanic Networks and Launch Dates

Count	Network	U.S. Launch Date	Headquarters
1	Univision	1961	USA
2	Galavisión	1979	USA
3	HITN	1983	USA
4	Hispanic Information and Telecommunications Network	1987	USA
5	Telemundo	1987	USA
6	Canal Sur	1991	USA
7	Cartoon Network (SAP)	1992	USA
8	Antena 3	1996	Spain
9	Fox Sports en Español	1996	USA
10	Utilissima	1996	Argentina
11	CNN en Español	1996	USA
12	Fashion TV	1997	Not Available
13	Discovery en Español	1998	USA
14	Latin TV (LTV)	1998	USA
15	Más Música TeVe Network	1998	USA
16	MTV Español (Tr3s)	1998	USA
17	Olé TV	1998	USA
18	Toon Disney (SAP)	1998	USA
19	Canal 52 MX	1999	Mexico

20	Cine Latino	1999	Mexico
21	CNC Colombia	1999	Colombia
22	EWTN Español	1999	USA
23	Grandes Documentales	1999	Spain
24	HTV	1999	USA
25	Puma TV	1999	Venezuela
26	TV Chile	1999	Chile
27	TVE Internacional	1999	Spain
28	VHUno	1999	USA
29	Boomerang (SAP)	2000	USA
30	Canal 24 Horas	2000	Spain
31	HBO Latino	2000	USA
32	Playboy en Español	2000	USA
33	Video Rola	2000	Mexico
34	Azteca America	2001	USA
35	mun2*	2001	USA
36	Telefe International	2001	Argentina
37	Infinito	2002	USA
38	La Familia Cosmovision	2002	USA
39	TBN Enlace USA	2002	USA
40	TeleFórmula	2002	Mexico
41	TeleFutura	2002	USA
42	Bandamax	2003	USA

43	Canal (á)	2003	Argentina
44	Caracol TV Internacional	2003	Colombia
45	Casa Club TV	2003	USA
46	De Película	2003	USA
47	De Película Clasico	2003	USA
48	elgournet.com	2003	Argentina
49	Family Christian Network	2003	Costa Rica
50	Gol TV	2003	USA
51	LATV	2003	USA
52	Maria Vision	2003	Mexico
53	MomentumTV	2003	Mexico
54	MovieWorld	2003	Mexico
55	Ritmoson Latino	2003	USA
56	Sorpresa	2003	USA
57	Telehit	2003	USA
58	TV Colombia	2003	USA
59	TyC Sports Channel	2003	Argentina
60	World Picks Latino on Demand	2003	USA
61	AYM Sports	2004	Mexico
62	CB TV Televisión Michoacán	2004	Mexico
63	Centroamerica TV	2004	USA
64	Cine Mexicano	2004	USA
65	Ecuavisa Internacional	2004	Ecuador
66	ESPN Deportes	2004	USA

67	The History Channel En Español	2004	USA
68	Latinoamérica TV	2004	Uruguay
69	Mexico 22	2004	Mexico
70	NDTV Color Visión	2004	Dominican Republic
71	Nicktoons (SAP)	2004	USA
72	Nueva Vida Vision	2004	USA
73	Once Mexico	2004	Mexico
74	SíTV*	2004	USA
75	WAPA-America	2004	USA
76	Discovery Kids En Español	2005	USA
77	Discovery Travel & Living (Viajar y Vivir)	2005	USA
78	DocuTVE	2005	Not available
79	El Garage TV	2005	Argentina
80	LN: Latele Novela Network	2005	USA
81	Mexicanal	2005	USA
82	Sol VOD	2005	USA
83	SUR MEX	2005	USA
84	SUR Perú	2005	USA
85	SUR Venezuela Globovision	2005	USA
86	Telemundo Puerto Rico	2005	USA
87	TV Venezuela	2005	USA
88	SuperCanal Caribe	2006	Dominican

			Republic
89	ochoTV	Not Available	Mexico
90	Teve-de-mente	Not Available	Mexico
91	VOY Network	Not Available	USA
92	EcuaTV	Not Available	Not available

Sources: *Multichannel News* (Oct 17, 2005); Television and Cable Factbook Online, DirecTV, and Echostar.

Table 6

Hispanic Population vs. Total Hispanic TV Advertising Revenue of Top 75 DMAs

_____

Year	Hispanic population	Total Hispanic ad revenue (000s)	Growth rate (%) Hispanic population ad revenue	Growth rate (%) total Hispanic revenue (000s)	General market total ad revenue (000s)
1986	19,154,000	Not available	Not applicable	Not applicable	Not applicable
1987	19,946,000	Not available	4.1	Not applicable	Not applicable
1988	20,786,000	Not available	4.2	0.0	Not applicable
1989	21,648,000	Not available	4.2	0.0	Not applicable
1990	22,379,000	Not available	3.4	0.0	Not applicable
1991	2,339,100	Not available	4.5	20.0	Not applicable
1992	24,283,000	Not available	3.8	16.7	Not applicable
1993	25,222,000	Not available	3.9	0.0	Not applicable
1994	26,160,000	Not available	3.7	0.0	Not applicable
1995	27,170,000	Not available	3.9	0.0	Not applicable
1996	28,099,000	Not available	3.4	42.9	Not applicable
1997	29,182,000	1,135,418.9	3.9	20	31,339,711.00
1998	30,252,000	1,468,784.9	3.7	50	33,109,586.8
1999	31,337,000	1,760,868.9	3.6	55.6	33,830,245.8
2000	35,306,000	2,094,893.90	12.7	17.9	36,889,876.2
2001	37,060,000	2,173,238.62	5	9.1	33,202,166.0
2002	38,277,000	2,689,062.30	3.8	13.9	33,864,849.5
2003	39,902,000	3,071,755.19	3.7	46.3	32,589,546.0
2004	41,322,000	3,122,692.62	3.6	25	35,233,989.8

| % Change, 1997-2004 | 115.7% | 175.0% | | | 12.4% |

Sources: TNS Media Intelligence, U.S. Census Bureau (Figures adjusted for inflation.).

Table 7

Hispanic Population vs. Total Hispanic Spot TV Advertising Revenue of Top 75 DMAs

_____

Year	Hispanic Population	Total Spot Hispanic Ad Revenue (000s)	Growth Rate (%) Hispanic Population	Growth Rate (%) Spot Hispanic Ad Revenue	General Market Spot Ad Revenue (000s)
1997	29,182,000	426,786.1	3.9	Not Applicable	15,064,212.8
1998	30,252,000	481,623.7	3.7	12.8	16,059,563.5
1999	31,337,000	549,261.8	3.6	14.0	15,572,502.4
2000	35,306,000	683,756.1	12.7	24.5	16,904,405.3
2001	37,060,000	600,237.8	5	-12.2	13,346,871
2002	38,277,000	759,890.9	3.8	26.6	14,924,745
2003	39,902,000	827,883.2	3.7	8.9	13,681,824
2004	41,322,000	958,156.7	3.6	15.7	14,842,777
% Change, 1997-2004	41.6%	124.5%			-1.5%

Sources: TNS Media Intelligence, U.S. Census Bureau (Figures adjusted for inflation.).

Table 8

Hispanic Population vs. Total Hispanic Network TV Advertising Revenue of Top 75 DMAs

_____

| Year	Hispanic population	Total network Hispanic ad revenue (000s)	Growth rate (%) Hispanic population	Growth rate (%) network Hispanic ad revenue	General market network ad revenue (000s)
1997	29,182,000	708,632.83	3.9	Not applicable	16,335,497.9
1998	30,252,000	987,161.25	3.7	12.8	17,050,023.34
1999	31,337,000	1,211,607.03	3.6	14.0	18,257,743.43
2000	35,306,000	1,411,137.80	12.7	24.5	19,985,470.90
2001	37,060,000	1,573,000.78	5	-12.2	17,885,128.11
2002	38,277,000	1,929,171.39	3.8	26.6	18,940,104.78
2003	39,902,000	2,243,872.03	3.7	8.9	18,907,721.89
2004	41,322,000	2,164,535.92	3.6	15.7	20,391,213.31
% Change, 1997-2004	41.6%	205.5%			24.8%

Sources: TNS Media Intelligence, U.S. Census Bureau (Figures adjusted for inflation.)

Figure 1. U.S. Hispanic population vs. Number of Hispanic networks
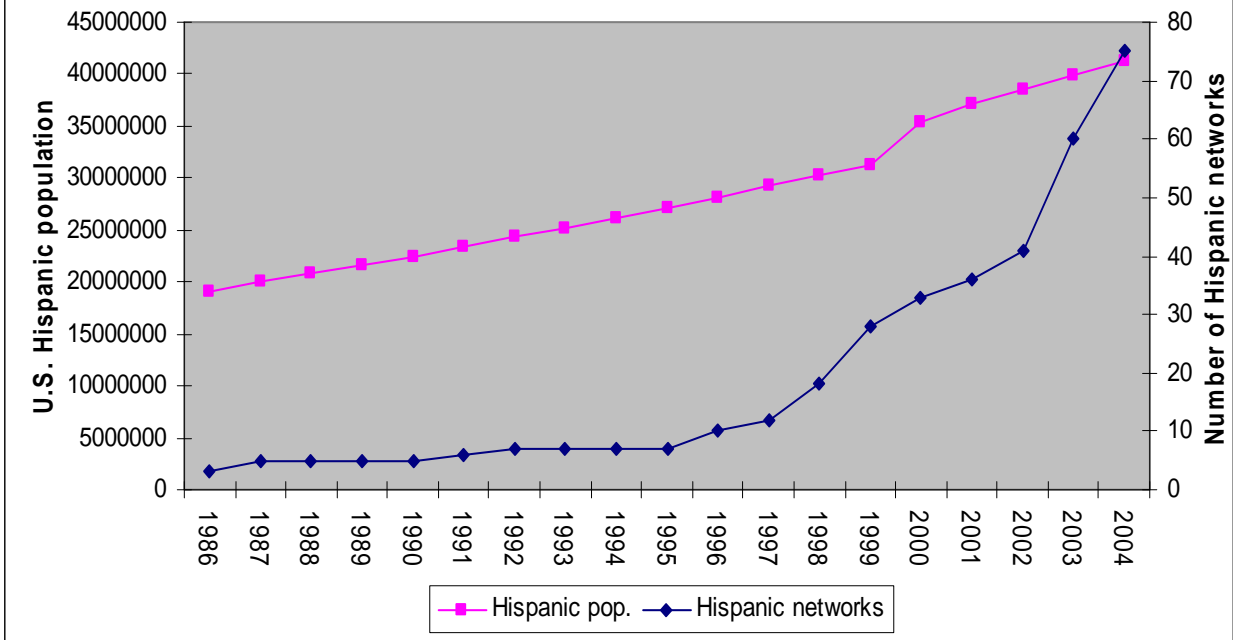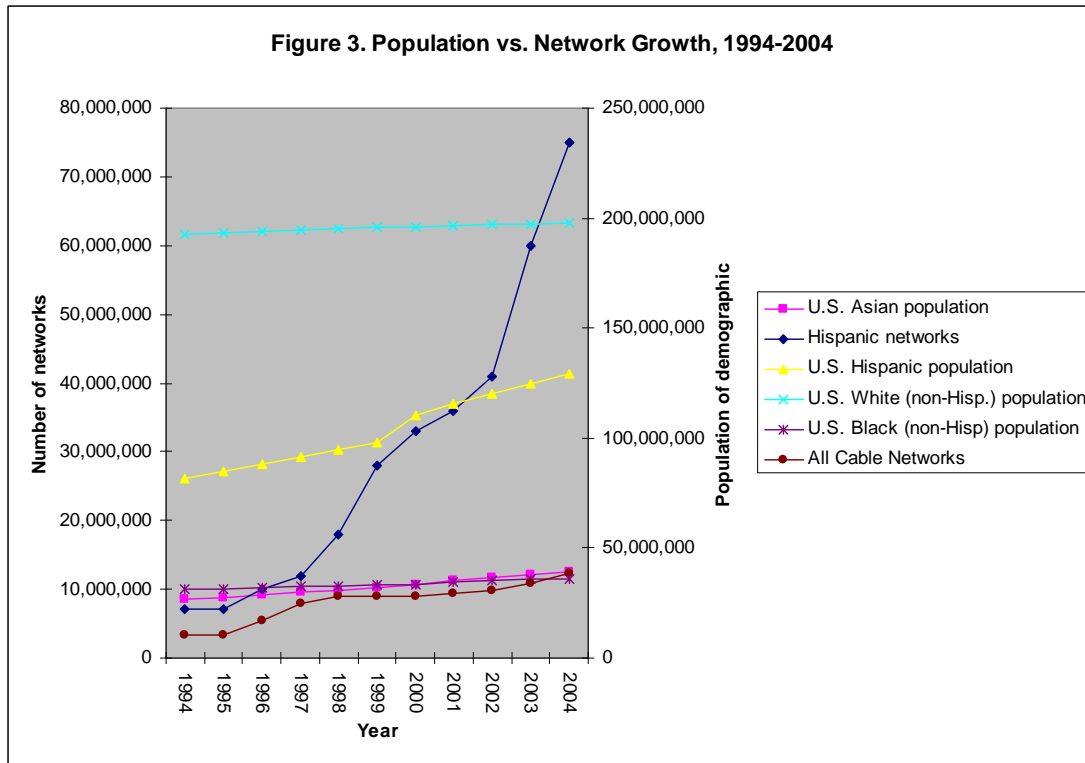
Sources: Multichannel News, DirecTV, Echostar, U.S. Census Bureau

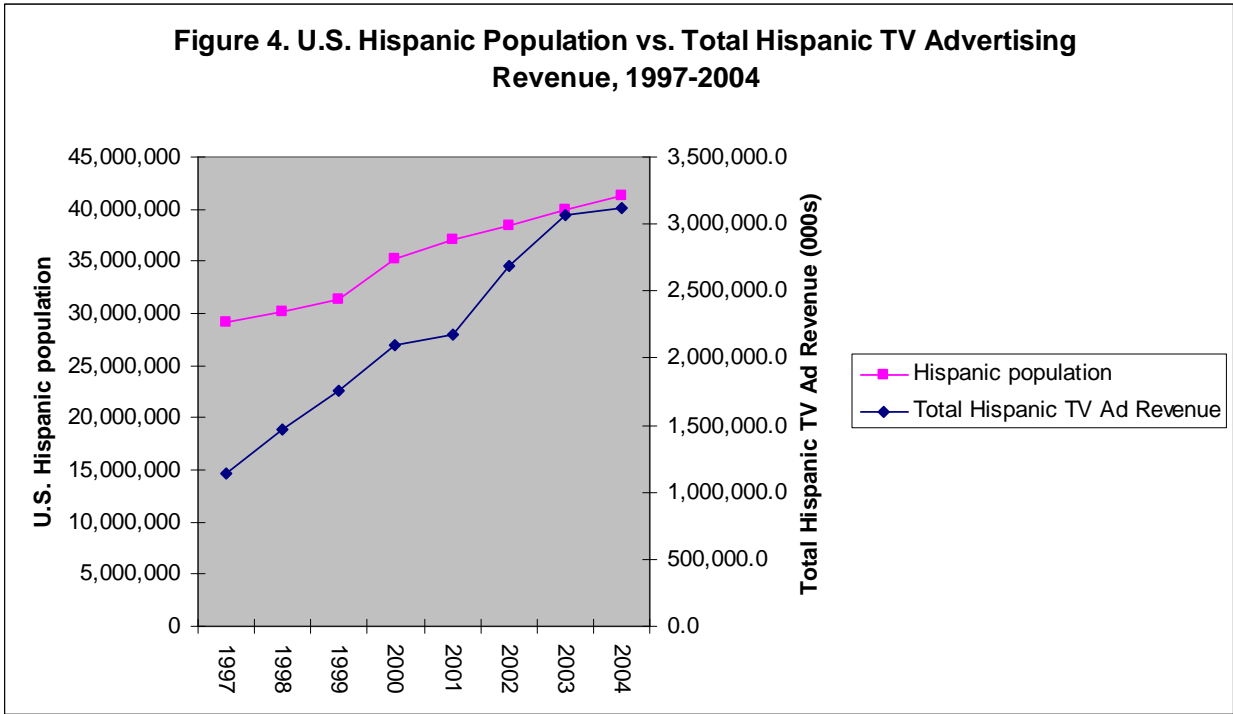**Figure 2. U.S. Hispanic population vs. Number of local Hispanic television stations**

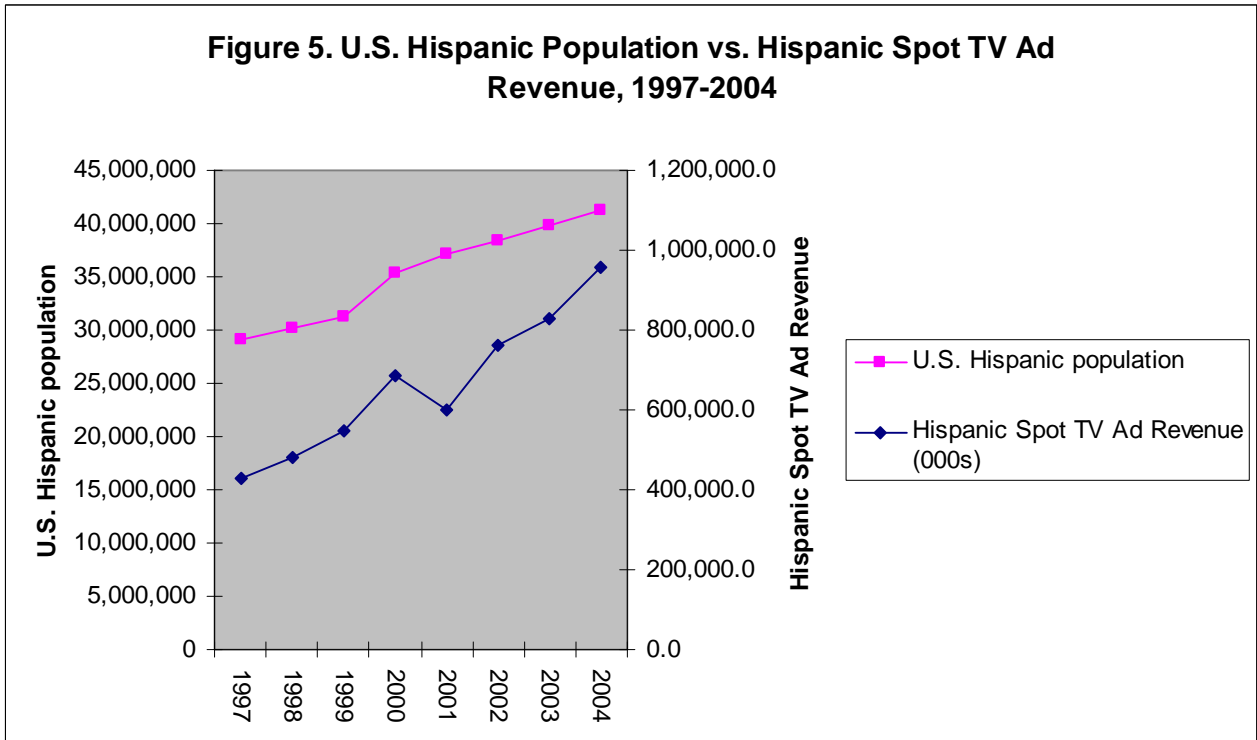Sources: TNS Media Intelligence, U.S. Census Bureau

Figure 3. Population vs. Network Growth, 1994-2004
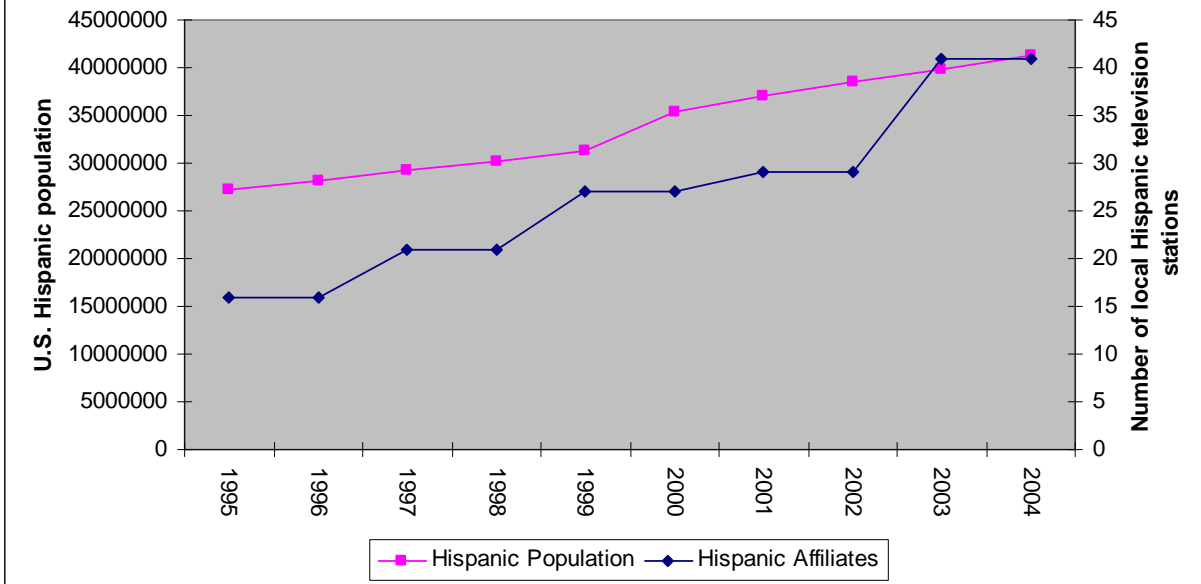
Sources: U.S. Census Bureau, Federal Communications Communication, *Multichannel News,* DirecTV, Echostar
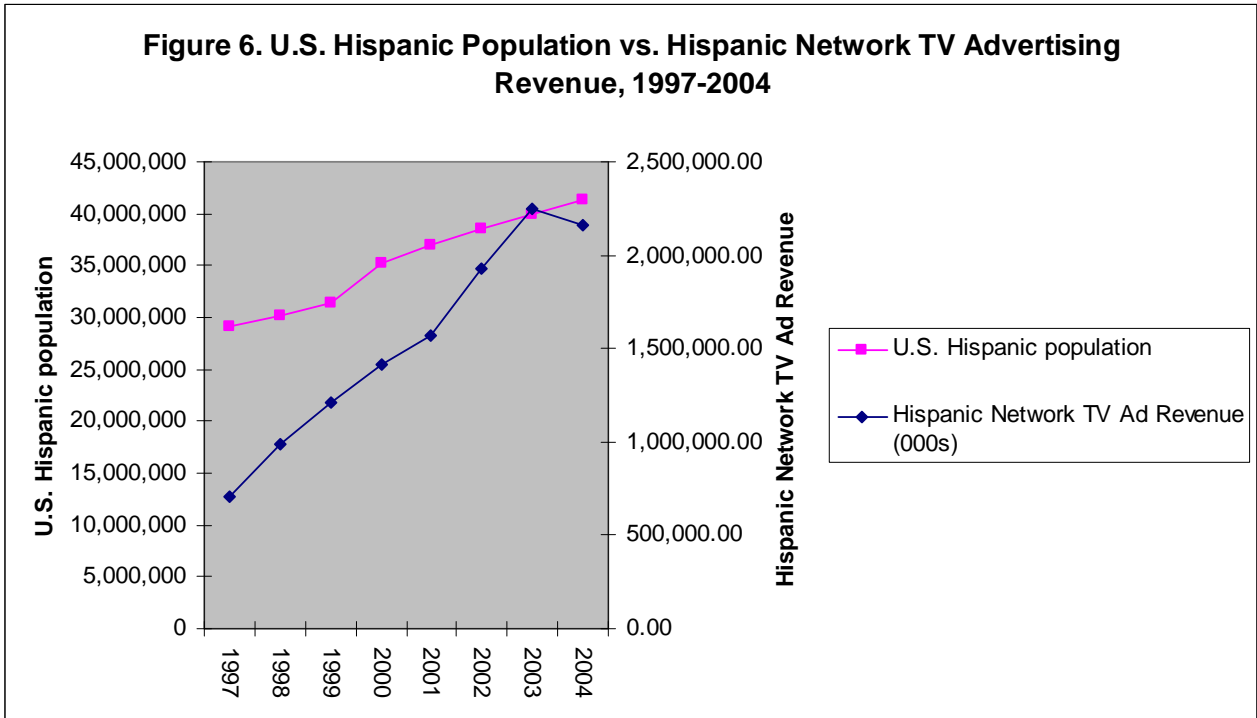
Note: Variables have been scaled to fit the graphing window so that comparisons in slope and trend patterns can be made. Therefore, quantitative values displayed may not represent the actual values of the variables in question.

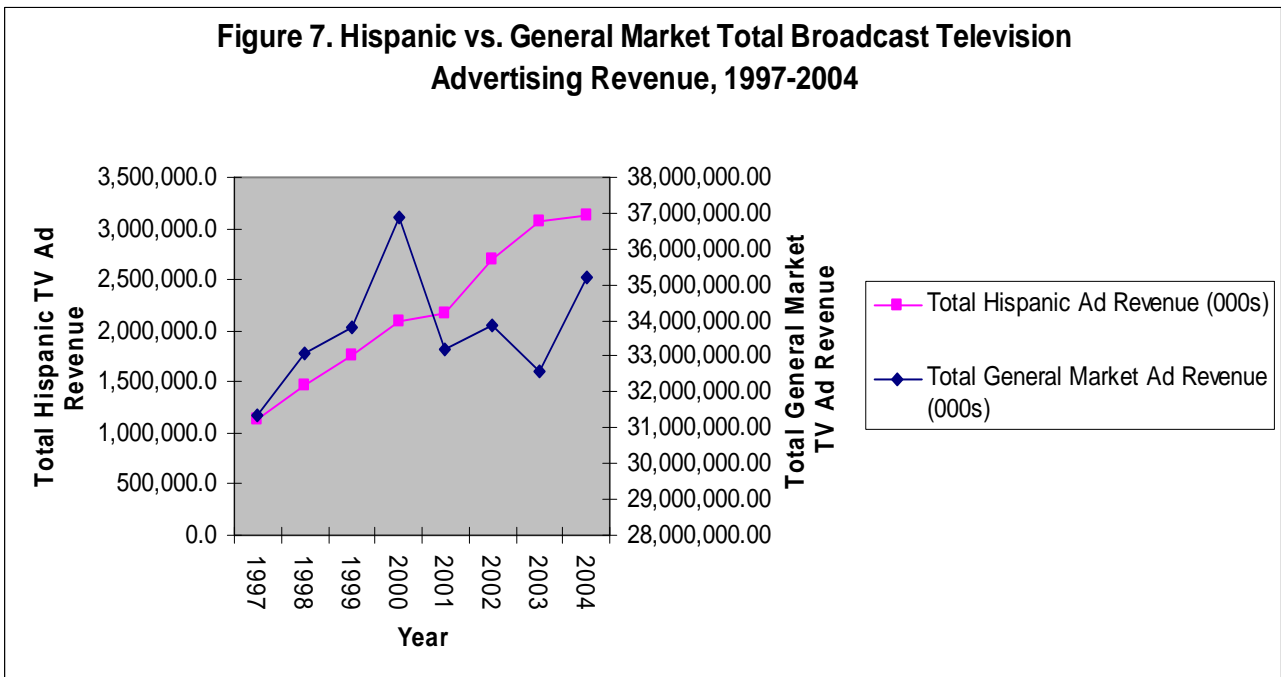**Figure 4. U.S. Hispanic Population vs. Total Hispanic TV Advertising Revenue, 1997-2004**

Source: TNS Media Intelligence, U.S. Census Bureau

Figure 5. U.S. Hispanic Population vs. Hispanic Spot TV Ad Revenue, 1997-2004

Source: TNS Media Intelligence, U.S. Census Bureau

Figure 6. U.S. Hispanic Population vs. Hispanic Network TV Advertising Revenue, 1997-2004

Source: U.S. Census Bureau, TNS Media Intelligence
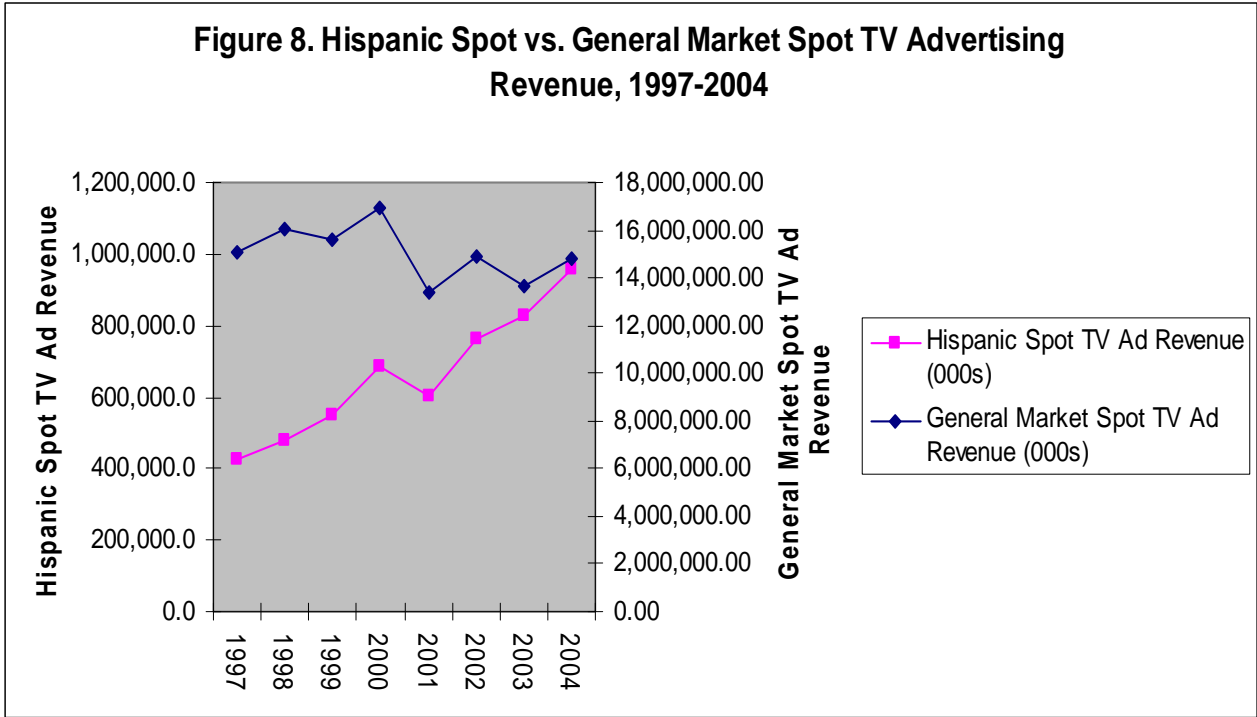
Figure 7. Hispanic vs. General Market Total Broadcast Television Advertising Revenue, 1997-2004

Source: TNS Media Intelligence

Figure 8. Hispanic Spot vs. General Market Spot TV Advertising Revenue, 1997-2004

Source: TNS Media Intelligence

Figure 9. Hispanic vs. General Market Broadcast Network TV Advertising Revenue, 1997-2004

Source: TNS Media Intelligence

Figure 10. Growth Comparisons, 1997-2004: Hispanic vs. General Market Trends
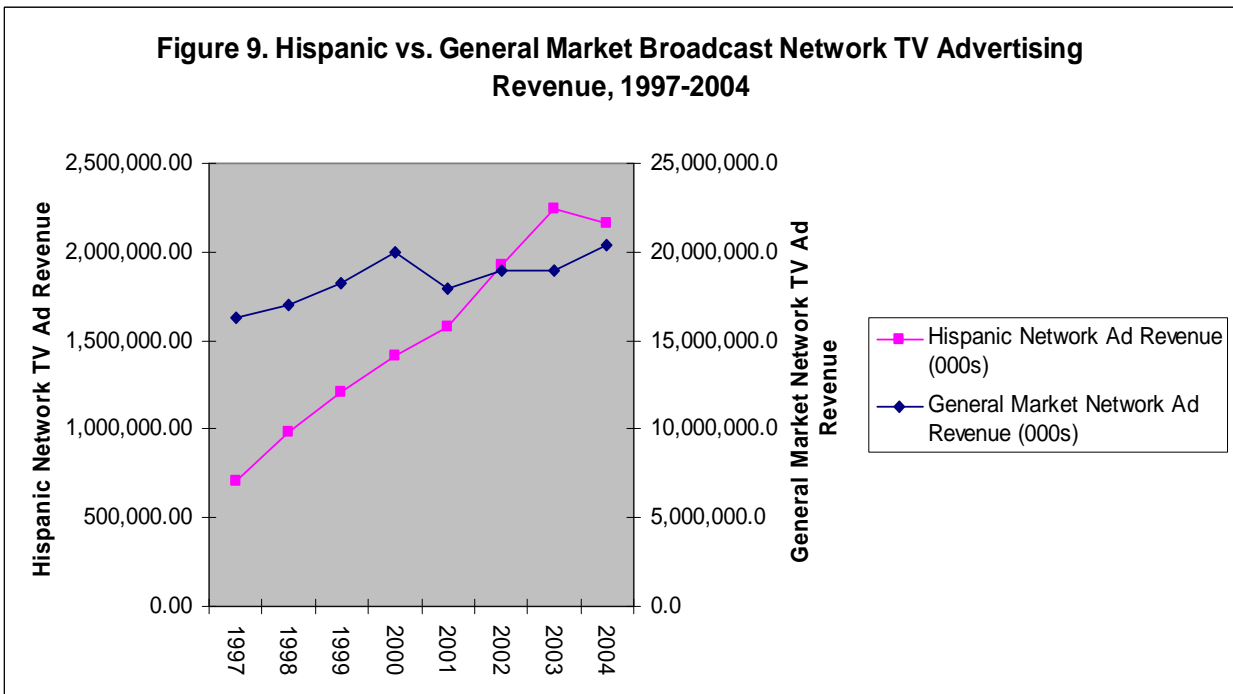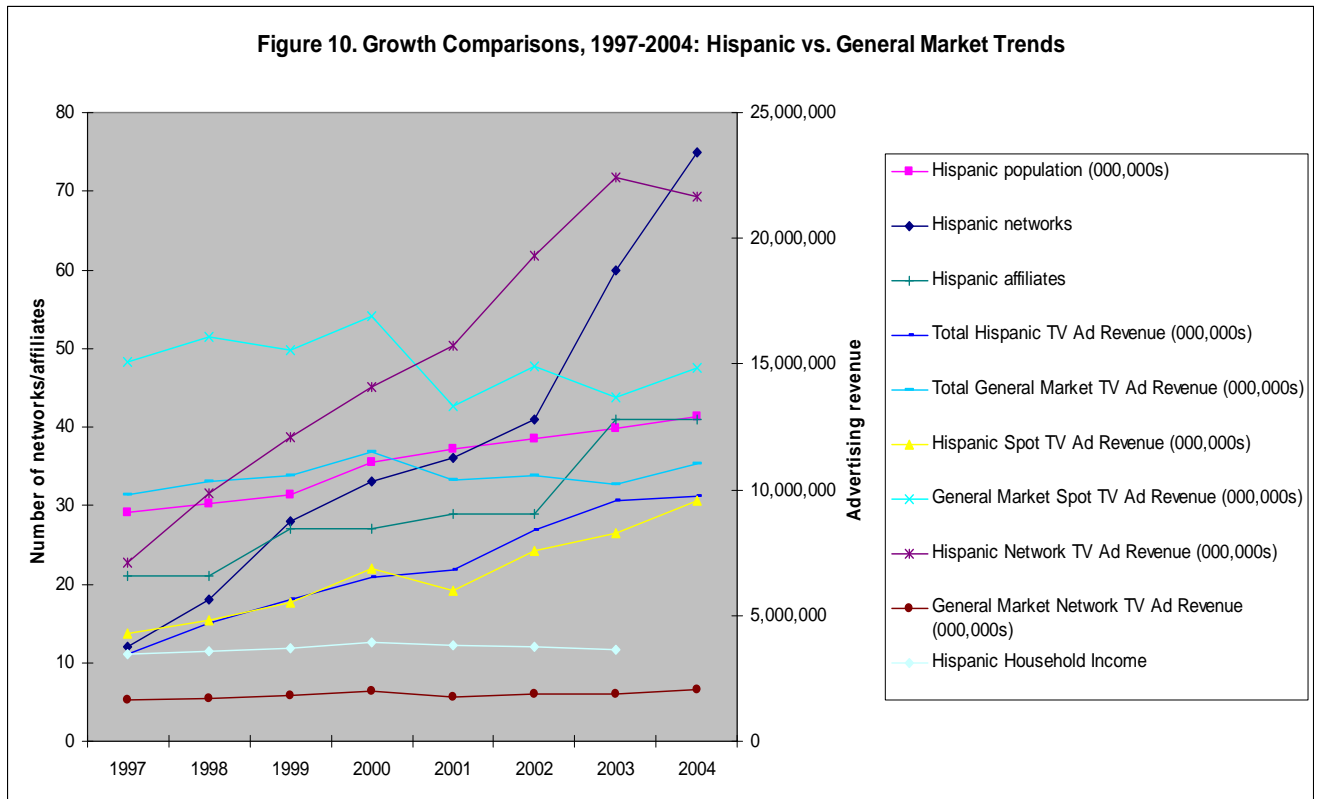
Sources: TNS Media Intelligence, U.S. Census Bureau

Note: Variables have been scaled to fit the graphing window so that comparisons in slope and trend patterns can be made. Therefore, quantitative values displayed may not represent the actual values of the variables in question.

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Technology and Market Development: How U.S. Spanish-language Television has Employed New Technologies to Define and Reach Its Audience

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Abstract

This paper represents a preliminary effort to trace U.S. Spanish-language television networks' application of new distribution and interactive technologies during the first four-and-a-half decades of industry history as they endeavored to better define and reach their audiences. Discussion of the technologies is organized into three sections corresponding with principal phases of industry development: the Spanish International period (1961-1986), the competitive period (1987-1995), and the multimedia period (1996-present). Each development phase presented new opportunities and challenges to the networks' leadership which they addressed, in part, through the application of new communication technologies.

Technology and Market Development: How U.S. Spanish-language Television has Employed New Technologies to Define and Reach Its Audience

The principal analytical emphasis on U.S. Spanish-language television since its inception has been on market size/profit-potential, ownership and control, and programming. Surprisingly little attention has focused on how the principal two networks, Telemundo and Univisión, have managed and benefited from technological change. This is a relevant topic given that the Spanish-language television sector has matured during a period of deep transformation for television technology in terms of the distribution and delivery of television signals, convergence with other media, and industry adaptation to new, interactive technologies. This paper represents a preliminary effort to trace U.S. Spanish-language television networks' application of new distribution and interactive technologies during the first four-and-a-half decades of industry history. Discussion of the technologies is organized into three sections corresponding with principal phases of industry development. This helps place the technological changes in specific contexts, and, we hope, deepens the reader's understanding of how U.S. Spanish-language television has evolved from the early years when it employed new and underutilized technologies in effective ways to reach a scattered, underserved viewer base. As the Hispanic population grew, the industry matured and more channels became available, Spanish-language TV companies faced changes/challenges associated with digitization and convergence, and have sought ways to apply new technologies to better define and reach segments of its diverse audience.

The Spanish International Period: 1961-1986

Prior to 1961 when the first television station began dedicating its entire broadcast day to Spanish-language content (KWEX in San Antonio), programs in Spanish aired at non-peak hours and advertisers were skeptical of the size and purchasing power of the audience. Rene Anselmo, an American citizen who was developing international markets for programs produced by Mexico's TSM network (now Televisa), became frustrated in his efforts to reach Spanish-speaking audiences in the U.S. through stations that broadcast in Spanish part-time and which did not value his target audience. Thus Anselmo persuaded his boss, Emilio Azcárraga Vidauretta, president of TSM, to let him develop a Spanish-language station group as well as a programming and advertising sales network to supply the stations with content. These entities became Spanish International Communications Corp. (SICC) and Spanish International Network (SIN) respectively— in 1986 the name was changed to Univisión. Although much of the early development work concentrated on legal, financial and advertising sales issues, there were technological concerns as well: no advertiser would purchase advertising spots on a station or network that did not reach its target audience. (The reader is reminded that in

the early 1960s television was still in its adolescence and regarded as a broadcasting medium—audiences were more generally defined than in the demographically-driven, niche-oriented environment of today.)

The first two SICC stations (KMEX in Los Angeles went on the air in 1962) broadcasted on the Ultra High Frequency (UHF) band prior to the Federal Communications Commission's (FCC) requirement that all new television sets sold in the U.S. include UHF reception capability. Viewers who did not own UHF-equipped sets had to buy a converter costing between 40 and 70 dollars—no minor investment at the time--in order to receive Spanish-language broadcasts. Spanish-speaking consumers' willingness to purchase the converters also signaled their interest in tuning-in Spanish broadcasts over the long term, a selling-point to advertisers. Broadcasting on the UHF band made good business sense because English-language broadcasters in several key Hispanic markets had lost faith in the UHF band and were eager to sell their stations. Rather than reach two or three markets on the costlier VHF band, with UHF stations SICC was able to enter five markets for the same level of investment. Thus Spanish International became the first U.S. company to form a national UHF television network.

Also key to establishing national network status for Spanish International was its initiation of satellite-based programming distribution in 1976. SIN was among the very first television networks to do so. Initially the satellite system functioned by a ground station in San Antonio receiving a terrestrial microwave signal from Mexico and uplinking it to a Weststar satellite which transmitted the signal back down the individual stations in its broad footprint. Later, after Mexico's Morelos satellite went online and the U.S. satellite market was deregulated by Ronald Reagan (in 1984) SIN was able to eliminate the microwave feeds and had more options for satellite carriers within the U.S. Satellite technology facilitated the distribution of taped programming, made the simulcast of live shows in Mexico possible, and fostered the development of the first domestically-produced national Spanish-language newscast in the U.S. The ability to transmit live national programming--a rare phenomenon prior to 1976--reinforced Spanish International Network's already dominant position in the industry. As discussed below, Spanish International executives also launched a proprietary satellite system that achieved worldwide coverage.

Another satellite-related technology employed by Spanish International in the late 1970s was low-power television (LPTV). Two types of LPTV were particularly significant for the geographic dispersion of Spanish-speakers at the time: translator stations and repeater stations. Translators receive a satellite signal, convert it to a broadcast signal, and transmit. Repeater stations receive the signal from a broadcast station via a terrestrial distribution system and re-broadcast it to a smaller market. Spanish International used LPTV in areas of high Latino population concentration that were too small to support a full-fledged, full-power television station. The smaller geographic area covered by an LPTV signal was of little concern since urban Spanish speakers tended to concentrate in a few central neighborhoods rather than in outlying suburbs. By the mid 1980s LPTV was delivering SIN programming to more than 500,000 Latino households located outside the broadcasting radiuses of its UHF stations (Kesler, 1986). The entry of SIN programming to small markets via LPTV likely discouraged small independents from entering Spanish-language television on the local level: although an independent broadcaster might be able to undercut SIN's advertising

rates, the overhead costs for that broadcaster would be much higher than Spanish International's.

Cable television evolved from its original status as a system to reach isolated communities to one that delivered more channels to densely-populated areas than could broadcast television. Two forms of cable service were offered by SIN: a basic service which (like the LPTV station signals) was received directly from a network affiliate, and a premium service named Galavisión which premiered in 1979 and was most succinctly described as Home Box Office in Spanish. When it became clear that some cable operators were reluctant to carry the basic service, SIN shrewdly offered them ten cents for every Spanish surname on their subscriber lists: more than 200 cable companies were carrying the service within three years (Valenzuela, 1985).

The important point behind these examples of applying new or under-utilized technology is that the Spanish International leadership--and Rene Anselmo deserves principal credit--actively sought cost-effective means of reaching its target audience. The leadership sometimes countered the mainstream or used technology in unconventional ways to expand SIN's reach to U.S. Hispanic households. The Spanish-speaking population was still underserved by television and growing in size, however. This opened opportunities for a competitor.

In 1985 when station KBSC in Los Angeles was put on the market Reliance Capital Corp. became the majority shareholder in Estrella Communications which acquired the station for $38 million, changed the call letters to KVEA, and went on the air in November of 1985. The new station quickly captured 40% of LA's Spanish-language audience--an audience which was growing so rapidly that KMEX, the well-established Spanish International station, experienced a simultaneous surge rather than decline in its viewership. Understandably Reliance Capital was eager to expand in its new-found market. Its opportunity came in 1986 when it purchased John Blair and Company for $325 million. Among Blair's properties were two Spanish-language television stations, WSCV in Miami and WKAQ in San Juan, Puerto Rico. Reliance immediately began selling Blair properties not connected to Spanish-language television, and acquiring stations in other key Spanish markets including WNJU in New York and KSTS in San Jose, California. Television broadcasting is a capital-intensive industry, of course, and as funding diminished affiliation replaced acquisition as the favored growth strategy; thus independently-owned stations in Galveston, Chicago, and San Antonio joined the Telemundo Network. In 1993 the network claimed to reach 85% of U.S. Latino households. As an upstart competitor not enjoying the consistent access to volumes of programming as SIN did (and Univisión still does) through its relationship with Televisa in Mexico (and since 1992 Venevisión in Venezuela as well), Telemundo has struggled financially and had less leeway to make innovative uses of technology in its early years. The network concentrated on acquiring or building broadcast stations urban markets, and reaching more dispersed populations through cable television systems which had entered many communities during the decade between Spanish International's pioneering adoption of satellite distribution and the emergence of Telemundo. Not until it was acquired by major communications conglomerates—Sony and Liberty Media in 1998, then General Electric/NBC in 2002--would Telemundo enjoy the capital and stability to venture into new technologies.

Emilio Azcárraga Milmo, who assumed stewardship of Televisa following his father's death in 1973, had overseen the satellite-related expansion of the Spanish International companies. He wanted his own satellite system not only to distribute television content to the U.S. and Spanish-speaking countries to the south and east of Mexico, but to utilize and sell other telecommunication services as well. Because Comsat and Intelsat retained a strong hold over satellite communication in the Western Hemisphere during the 1960s and '70s, he faced stiff resistance. The "carrier-of-the-week" system whereby television programs were transmitted between the U.S. and other nations permitted four heavyweights in the communications industry-- Western Union International, RCA Global Communications, ITT Worldcom and AT&T--to take turns as the purveyors of TV signals transmitted from overseas by Comsat. Comsat customers such as SIN were required to use the services of the designated "carrier-of-the-week" in order to receive their signal from a Comsat earth station. In petitioning for the abolition of this and other middleman services, SIN was joined by other businesses and organizations with international communication interests (including the three major English-language TV networks and the U.S. Departments of Justice and Defense). The rule change allowed entities receiving international signals to link directly with Comsat thereby eliminating a cumbersome and costly intermediary service.

The Pan American Satellite Corporation (Panamsat) was formed in 1983 and the following year requested FCC permission to construct, launch and operate its sub-regional satellite system. In order to protect their interests Comsat and Intelsat petitioned the FCC to deny the request and significant legal wrangling ensued with various networks and agencies again joining Panamsat in an effort to deregulate satellite communications. President Ronald Reagan settled the matter by issuing a Presidential Decree (#85-2) on November 28, 1984 which permitted the construction and operation of three international satellite systems which, the president wrote, would serve the national interest without causing significant financial harm to Intelsat. Panamsat was one of the three satellite systems.

The Competitive Period: 1987-1995

This period may reasonably be considered one of adolescence or early adulthood for the U.S. Spanish-language television industry. It began with significant changes at Univisión (formerly Spanish International) resulting from two long-term legal processes, and ended with the internet explosion in the mid 1990s which, we argue, significantly changed the operating environment for the networks.

In 1986 Univisión-owned stations were forced to relinquish their broadcast licenses after the FCC corroborated allegations of illegal control by a foreign national, the aforementioned Emilio Azcárraga Milmo. There was also a stockholder derivative lawsuit against the Spanish International companies which had been filed in 1976 and was resolved in conjunction with the proceedings regarding illegal foreign control. Hallmark Cards Corp. and its (short-term) partner, First Capital of Chicago, initially acquired the station group alone, then paid an additional $300 million for the programming and ad sales network (SIN) including a right-of-first-refusal programming agreement with Televisa. Even with this expensive lock on imported Mexican

programming Hallmark increased the airtime devoted to U.S.-produced programs from approximately 6% in 1987 to nearly 50% five years later. The principal impetus for the expensive programming agreement and domestic production increase was competition, which as we have seen, began when the Telemundo Network formed in 1986 and expanded rapidly thereafter.

The increase in domestic production at both networks required significant investment, of course, including building and/or refitting studios. In 1990 Univisión relocated its headquarters from Laguna Niguel, south of Los Angeles, to Miami. Telemundo's main production facilities were located in San Juan, Puerto Rico and Hialeah, Florida. This concentration of production activities in South Florida raised concerns about who would influence U.S. Spanish-language television news and entertainment, especially among people of Mexican origin (Wilkinson, 2002).

Hallmark Cards was not satisfied with the returns on its investment and in 1992 sold the Univisión station group and network, for $550 million, to an investment group comprised of Televisa, A. Jerrold Perenchio, an established Hollywood producer, and Venevisión, a powerful Venezuelan broadcasting concern. Televisa's re-entry to U.S. Spanish-language television accompanied by another prolific television producer reflected increased an attention to international markets in the late 1980s through mid 1990s. Implementation of the 1989 Free Trade Agreement between the U.S. and Canada and subsequent discussions to include Mexico in a continental agreement by 1994 increased investor interest in Mexican communication companies, as well as the possibilities of reaching multiple Spanish-speaking markets with the same television content. To this end, program libraries were purchased and hastily translated, joint ventures to produce programming were formed, and a variety of pay television services with a Latin American focus (many including the U.S. Spanish-language sector) were launched. The major population centers in Latin American had been wired with cable or were served by Multichannel Multipoint Distribution Systems (MMDS, "wireless cable") by the early 1990s opening more channels for imported content and bypassing over-the-air broadcasting restrictions in some countries.

In 1993 the Mexican government privatized its anemic Imevisión network to the tune of $620 million spawning the upstart Televisión Azteca and fostering the first real competition in the country's broadcast television since the 1950s. TV Azteca quickly entered an ill-fated programming agreement with NBC as well as a program sharing agreement with Telemundo which did not develop as anticipated. A point to emphasize here is that advances in satellite technology, digitization, pay television delivery systems, etc. enabled the flurry of agreements, joint ventures, channel launches and the like that became profligate during this period. Not surprisingly, Televisa and its U.S. partner, Univisión, were among those making prudent use of the technology.

As noted in the prior section, Televisa principals were behind the original development of Panamsat. Following the sale of Univisión to Hallmark, Rene Anselmo acquired control of the company and sought a major investor to help finance his effort to create the first privately-held satellite system with global coverage, one that could compete against Intelsat, the satellite consortium which was jointly owned by 120 governments. In 1993 Emilio Azcárraga Milmo invested $200 million in exchange for a 50 percent senior equity position in Panamsat. "We expect dramatic growth in satellite demand over the next decade," Azcárraga said, "our association with PanAmSat will

permit Grupo Televisa to expand the domestic and international distribution of our programming to the world's 350 million Spanish-speaking people" (Hartshorn, 1993: 17). Panamsat would not only bring programming from Mexico and other Spanish-speaking countries to the U.S., but also distributed popular U.S.-produced programs such as *El Show de Cristina* and *Sabado Gigante* throughout Latin America.

Azcárraga also saw the investment in Panamsat as a key link in his effort to build Cadena de las Américas ("Americas Network"), a television vendor group he launched in 1992. The group encouraged television networks to pool their advertisers in long-term (three year) commitments to be paid in advance but which offered discounts as high as 75 percent on normal advertising rates. The Cadena constituted a central element of Televisa's strategy to "go global with Latin America as an anchor" (Reyes, 1994). The Mexican peso devaluation of 1994-95 caused Azcárraga to scale back on his regional and global plans, including divesting of station investments in Peru and Chile, and had a chilling effect on the aforementioned investment fervor connected to the North American Free Trade Agreement. The U.S. Spanish-language networks were little-affected, however, and continued their growth in stride with the Hispanic population.

The Multimedia Period: 1996-Present

The final period we examine corresponds with the emergence of the internet as a consumer and entertainment medium as well as the rapid development of other multimedia and interactive technologies in the information age. The challenge for the Spanish-language television companies has been to establish a strong presence on the World Wide Web and to make sound strategic alliances with new media companies that will point consumers to their television channels, web sites, and other media properties.

Before reviewing the new media advances, we should discuss an important technological and programming development in the pay television industry. With the profusion of new channel space opened through digitization, digital compression and related technologies, more channels have became available at lower cost on cable and direct-to-home television systems. Thus Telemundo and Univisión launched channels catering to niche audiences within their demographic of Spanish-speakers, and also reached across the language divide to attract more bilingual and English-dominant Hispanics. In an effort to attract the younger audiences coveted by advertisers, Telemundo converted its female-oriented channel Gems to Mun2 in 2001. Univisión launched its Telefutura service in 2002 and both networks have developed music video channels targeting the youth market. These channels are part of a broader industry trend toward narrowcasting, yet are instrumental in defining and serving a rapidly-growing population segment that has been difficult to reach and retain through lowest common denominator programming due to its geographic, linguistic and ethnic diversity. We should also note that this expansion of outlets for Hispanic-oriented programs has coincided with the .com boom and the Latin boom that brought increased recognition and status to U.S. Hispanic, Latin American and Iberian culture. (Unpacking the compelling relationships among those booms is the topic for separate study.)

In 1999 Univisión became the first U.S. Spanish-language television network to launch its website, Univision.com, and has been cited consistently as the most widely used Spanish-language website among Hispanic internet users (Univision.com touts

ranking, 2006).   Telemundo partnered with a number of internet portals including espanol.com and quepasa.com early in the 2000s, and in 2006 established a more consistent presence when telemundo.yahoo.com launched. Both networks' sites feature promotional material for their television shows as well as the many links to various lifestyle content as one has come to expect of major internet portals. Both networks have also launched digital media divisions to reach consumers through interactive technologies such as cellular telephones and iPods. Univision Movil launched in 2004 to provide mobile games, ring tones, wallpaper, audio tones, news, and mobile greeting applications. Telemundo dedicated a new division of the company to digital technology in 2005.

Conclusion

Given the preliminary nature of this study we are reticent to offer firm conclusions— those will have to wait until further research and analysis can be conducted (between now and November when the conference convenes). Furthermore, in late March 2007 the FCC approved the sale of Univisión to a group of private equity companies for $13.7 billion, including the assumption of $1.4 billion in debt (Bachman, 2007). The results of this important development also need to be monitored and integrated into our analysis. The general picture that has emerged from our research is one of an industry advanced by entrepreneurial energy in the early years of its early development, and which successfully promoted or adapted to technological change as it matured.

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Quality Index in Chilean Open Television

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Abstract

This article presents the genesis/development of the construction of a quality index for open television in Chile and the main findings of its application in the year 2006. A theoretical analysis of the concept of quality in the mass media industry, and a qualitative study that shed light on the concept from the viewpoint of the industry, TV audiences and advertisers, provided the background to generate an index whose main strength is that it integrates the opinion of viewers, their behaviour, and the intrinsic quality of the product. The results of the application of this index show that in terms of quality, Chilean television is considered to be average to middling, with news programs as the best evaluated and miscellaneous/general entertainment programs with the poorest evaluations.

Quality Index in Chilean Open Television

Introduction

This article puts forth a quality index for open television in Chile, the steps followed in its design and some of the findings of its first application.

After a brief survey of quality studies in the world, we present the results of the first stage of our research, which began in the year 2004, consisting in a qualitative study to get to know the concept of quality in open television prevailing among the stakeholders of the Chilean television industry: executives from the different channels, critics, academic intelligentsia and experts in legal issues. This work replicated the research done by Italian scholars Giuseppe Richeri and María Cristina Lasagni (1996), with the addition of the qualitative perspective in viewers, and also interviews with the marketing managers of some of the main companies advertising on television. We carried out meetings with focus groups and over 150 in-depth interviews until April 2006, all of which gave us a solid foundation to approach our work from a quantitative perspective.

The revision of the literature and qualitative research preceded the elaboration of a quality index that takes into account the complexity of this term and the opinions not only of scholars but also of viewers and the industry. The result was a quality index for Chilean open television, the main strength of which is the integration of three baseline components: the audience, through the expression of their opinion (survey); the behaviour of the audience (rating), and a contents analysis seeking to determine the intrinsic quality of audiovisual products.

I. Theoretical Background

The debate on quality is particularly complex in the case of mass media and particularly so in television, in which several objectives converge. Yet, despite its complexity the quality issue must be addressed, since it is a key concept from the point of view of the industry, as demonstrated by the vast research on quality (Crosby, 1979; Feigenbaum, 1986; Ishikawa, 1996 etc.). Much of the research done so far has dealt with the concept of quality in the manufacturing industry rather than in the services industry or mass media. However, there are authors like Garvin (1987), whose work bears more relation to the latter type of industry as it refers to the dimensions of perception of quality by the audience: performance, features, reliability, conformance, durability, serviceability, aesthetics and perceived quality.

Mass media, however, have characteristics that are inherent to them. Lavine (1992) has identified the following: nature of the product (for example, a news program "shelf-life" is over once it has been on air; on the contrary, the value of a good film does not expire once it has been shown, but becomes part of heritage); type of television worker (in general, very creative people doing mainly intellectual work); corporate structure and organization (for example, TV writing rooms versus management offices); and progressive disappearance of the boundaries of the traditional media given that technology has triggered convergence.

Arrese (2004) also refers to the particular characteristics of this type of corporation and the complexity of mass media products which, according to him have two components, a non-material one, i.e. content, and a material one, i.e. support. Arrese characterizes television products as dual, "given that, in general, they constitute

two complementary products addressed to two different markets: audience-centred contents and sponsor-centred audience viewing time" (p.14). Arrese also points out that television involves talent assets, given that   "(…) the principle that people are the most important asset of a business becomes true in the mass media sector, if in any at all" (p.18).

Perhaps the nature of product and worker may be the most distinctive features of a mass media business. A media product goes beyond its physical support, and its most important part are the "ideas" expressed via this support. If we add the impact that these products have in the forming of opinion, values, behaviours, etc., of the persons with access to media exposure, the importance of their study becomes unquestionable. Thus, the quality of   informative products not only has economic implications, but involves social and political aspects (Arrese, 2004).

Most of the media quality studies are enrooted in the social sciences and have sought to formulate theories that account for "how the world functions", rather than to help the media to produce better quality programs. In turn, mass media have resorted to market and audience research in the definition of their contents.

Having said this, it is possible to find some studies dealing with quality in the mass media (Lacy, 2000; Nieto & Iglesias, 2000; Picard, 2000; Sánchez-Tabernero, 2001). If we focus on television in particular (no pun intended) the work by Gutiérrez (2000) describes different approaches attempting to identify and define quality in television through a review of the international debate.

In addition, from a more theoretical viewpoint, Medina (2001) approached the doctrine of quality in television and identifies some perspectives: quality and public interest; quality and European culture; quality and freedom of expression; diversity of programs; quality and economic benefits; and technical and professional quality. Some of these criteria have emerged from a conception of television as public service, and others from the conception of a profit-making concern.

Special mention deserves research having to do with the quality of news and current affairs programs. Probably, because of the increased professionalization of journalism, the concrete identification of certain quality parameters can be achieved more easily than in other areas (Costera, 2001; Costera, 2003). García Avilés (1996) has done some interesting work on a comparative description of the CBS, NBC and ABC news standards. In addition, there are many manuals describing the "good practices" of television journalism (Barroso, 1992; Mencher, 1997, among many others).

Also at a more general level, there are works seeking to deal with the quality issue in a more objective way and proposing concrete measure to do so. Such is the case of *Quality Assessment of Television*, Sakae Ishikawa (Ed., 1996) which was the result of a research project launched in 1990 and carried out in five countries, with sponsorship by NHK (Japanese public television). Ishikawa refers to the different traditions of research on television quality in the different countries (Sweden, Canada, England, Japan and the United States) covered by the study; seeks to arrive at an objective quality measurement system both from the point of view of audience and experts; and highlights the importance of public service and diversity as quality-constituting elements.

The research by Richeri and Lasagni (1996) also seeks to determine objective measurement parameters by means of in-depth interviews to different stakeholders of the television industry, in which they must define what they understand by quality in television. Some measurable quality parameters on which there was agreement emerged from these interviews.

Medina (1998), in an original approach, presents an innovative perspective of quality, by applying it to the evaluation of programs in terms of their advertising capability. In her work, she puts forward some quantitative and qualitative supply-side benchmarks that make it possible to measure the degree of satisfaction of the needs of viewers and advertisers. She expresses these measures in terms of productivity: productivity of the publicity investment (the relation between expenses and audience of a program); advertising productivity in terms of investment in production (ratio between investment in production and revenue from advertising);   advertisement productivity in terms of audience (relation between investment in publicity and audience attained); publicity effectiveness (in terms of publicity saturation); persistence in time (in terms of degree of program recognition/recall); and evolution of audience levels. As for intangible values, Medina zooms in on four: content (rapport, solidarity, respect, sense of humour, and informative value); technical quality (translated into a profitable and balanced grid); business management (advertisers' profile); and audience (viewers' profile).

Studies on quality in Chilean television have been carried out mainly by the National Television Council (Consejo Nacional de Television, CNTV). In recent years, this entity has been conducting the "National Television Survey" (CNTV, 2005), including measurements of audience satisfaction with open and paid television, levels of credibility (compared to other media), audience-perceived quality of the different program genres, reasons for dissatisfaction, types of unsuitable contents according to viewers, opinions on coverage of given topics, position of viewers about scenes of sex and excessive violence, etc. The CNTV has also carried out specialized studies of unsuitable contents in programs for children. Also, in July 2005, it implemented a quality barometer of prime-time news programs, aiming at the objective measurement of their contents. The Faculty of Communication of the Catholic University of Chile has also done some work along these lines with its Journalistic Added Value instrument (Valor Agregado Periodístico, VAP, in Spanish, 2003). Another entity that has also carried out similar measurements is media observatory Fucatel (2004), which in 2004 published *Televisión y ciudadanía. Presencia de temas ciudadanos en la programación de 4 canales de la televisión abierta chilena.*

The Faculty of Communication and Media Studies of the Universidad de los Andes, has also contributed with qualitative research carried out in 2004 and 2005, published under the title of *El Desafío de la Calidad* (Mir (Ed.), 2006).

II. Qualitative Aspects

1. The vision from the industry

As mentioned above, given the complexity of the term "quality" when applied to mass media, in this part of the research we opted for adopting the approach of the research carried out by Richeri and Lasagni in Italy, published as *Televisione e Qualitá. La Ricerca Internazionale. Il Debatito in Italia* (Richeri and Lasagni, 1996), which gives an account of the visions of the main stakeholders in the industry.

We carried out interviews with 21 stakeholders operating within the field of television, between May 2004 and June 2005, using a standard questionnaire[1]. The interviews were recorded, transcribed and later collated according to a pre-designed scheme. We used the questionnaire design of the Italian authors –whose

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[1] Top executives of television channels (7), experts (4), critics (1), experts on legal issues (4), programme authors (5)

methodological support was most relevant– as it has a progression that facilitates the respondents' reflection and systematization of their opinions.

In this connection, it may be of interest to refer to the agreements and nuances observed in the process of analysis of the data.

Contrary to general belief, those involved in the design of program grids showed their concern about the quality standards of Chilean television. As the respondents answered the questions, they became gradually involved and, in general, expressed coherent visions about quality, which goes to prove that there has been reflection on, and questioning of, this issue.

All of the respondents underscored the massive vocation of television. However, some of them introduced nuances in what they said by, for example, making a difference between rating and audience or stating the importance of audience fidelization throughout the whole of the grid. One of the respondents referred to the tension between rating and branding, defined, among other factors, in terms of the value of credibility.

All interviewees, even those who work for the private television channels consider that they have a mission and a certain social role to serve. In this sense, being faithful to that mission is a quality parameter. Only one of them considers that television plays no special role in society. Also, they coincide in assigning a "special mission" to public television which, one way or another is associated with pluralism. The mission is accomplished through the "face" of the channel, i.e. the program grid and, consequently, the quality of the television networks is measured according to the quality of its grid.

The respondents declare that they are willing to accept certain limitations to the contents that they may deal with, but that such limitations should be the result of internal processes. They refer to self-regulation. Some of them are in favour of making this self-regulation explicit through codes of practice. What they do not question is the pertinence of identifying and controlling certain time slots, as they consider that children are an audience that needs watching over. In general, they say the in-house culture of the channel should reflect the acceptance of those limits and the development of an editorial policy. To achieve this, is it fundamental that those who work in each of the channels should be made aware of the particular in-house culture.

The respondents consider that the concept of quality is genre-related. When speaking of entertainment programs, they refer to innovation, talent and the right combination of the different elements constituting the program. One of them stresses that in this type of program, it is difficult to work on the content. Some of them say that this is because this type of audiovisual product is fundamentally addressed to the domain of emotions.

The journalistic genre is acknowledged as crucial in the program grid of the channels. In this case, some of the elements that determine quality are the definition of the program scheme and guidelines, interest of the audience, empathy, independence, and capability to mediatize and contextualize the news.

On the whole, the respondents say that the quality of fiction, particularly of the Chilean television series, is good. The plot or storyline is acknowledged as a quality parameter in this area. Some of the respondents point out that there is still a weakness in Chilean television: the lack of good scriptwriters. They also consider that the combination of actors, stories and locations is an important element.

Other quality parameters of the programs themselves, regardless of genre are effectiveness, empathy, audiovisual language, innovation and the contents and values conveyed. With respect to innovation, the respondents stress the importance of

generating new talent and the contribution of independent production companies in this connection.

2. The audience: quality resides in contents

The key stakeholder of the Chilean television industry is the audience. Although there is detailed data on TV viewers from a quantitative point of view –the rating and surveys supply this information– there is no clarity as to what the audience of each program values. The audience perception of quality in open television was explored through four focus group sessions involving ABC1 men and women (upper income brackets) aged 18 to 25; and C2C3 men and women (medium income brackets) aged 18 to 25 (June-July 2005). We also carried out 140 in-depth interviews with men and women of socio-economic levels ABC1, C2C3 and D (low income) aged 18 to 25; 25 to 35; and over 35 (November – December 2005 and March 2006). Both the focus groups and in-depth interviews were based on the questionnaire devised by Richeri and Lasagni.

As a general conclusion in connection with this point, we can say that all groups watch open television every day. In the upper income socioeconomic groups they do so to watch the news; in the lower socioeconomic groups, particularly women, they look for entertainment.

In general, the quality of open television is associated with three basic elements: information, education and entertainment, with information and entertainment as the most valued. What respondents most expect from the audiovisual media is education, particularly in the lower socioeconomic sectors. For the majority of respondents, the quality of open television is defined by its contents and not by its form. These contents have to do with the objective approach of news programs, the soap opera scripts, guests of general entertainments shows, and sports commentators.   In a nutshell –in the words of the respondents– quality has to do with the added value of the programmes.

However, everybody seeks entertainment value, not only in soaps and miscellaneous programs but also in cultural programs. Television must be fun. There are variations in the degree of importance assigned by the different socioeconomic groups, and by men and women to information and entertainment when watching television. The higher socioeconomic level, the more importance is given to information. In general, men also assign more importance to information. In the lower socioeconomic levels, particularly among women, it is entertainment that is considered more important.

Women, and in general the C2C3 socioeconomic group, are more knowledgeable about the programing of open television. This group and that of women in the D socioeconomic group, particularly the youngest ones, are satisfied with what they see on television. The men in the D group are very much dissatisfied with the quality of television. They expect more education from this medium.

In general terms, the respondents appeared to be dissatisfied with what is aired on open television, either because of moral considerations or lack of innovation, diversity and education.

All the respondents are wary of the influence that television may have on their children and for this reason they consider that an effective censorship of the scheduling and timing of the programs is the right thing to do. They point out that television shows as normal some behaviour patterns that are not so.

There are peculiarities in each of the groups. Men and women over 35 expressed their nostalgia for the past, as reflected in their statements that they miss some personalities and programs; ABC1 men of all ages mentioned innovation as an attribute of quality.

D women of all ages valued identification and being shown "real things" as positive. They also valued service and, in general, education, but understood as education for their daily life. ABC1 women of all ages mentioned coarseness and vulgarity as attempting against quality in the programs. All the socioeconomic groups mentioned the lack of diversity as a problem in television today.

3. Advertisers and quality of open television

The television market is not only made up by the open television channels and the audience. The media networks sell this captive audience to a third party: advertisers. In this section we shall deal with the degree of involvement of advertisers and their perception of the relation between quality of television programs and branding.

In the first half of 2006, seven marketing managers of large companies advertising on television were approached and asked to respond to a standard questionnaire. In general terms, we can say that all of them coincide in the importance of television in their publicity structure. At least four of them point out that over 60 per cent of their publicity investment goes to open television. They all agree that this is because television is the advertising medium that offers more advantages in terms of costs per contact.

These marketing managers consider that television is a good publicity alternative given its low cost per contact, particularly in the case of mass consumption products.

In general, the information to take the decision to advertise in a given program or channel may come from two sources, the media agencies and, to a lesser extent, their own research.

The media agencies focus on quantitative data and the qualitative component is contributed with by the advertising company through the more or less explicit corporate philosophy and guidelines provided by either the owners or senior executives.

Many executives complain about the lack of information on the sort of audience that watches given programmes and their preferences. In fact, some of them do or commission their own research to cover these aspects. Others would like to have greater clarity as to the content of the programs in which they advertise, which in many cases has been changing with the passage of time.

In general, evaluations are being carried out after the publicity campaigns, but due to the multiplicity of variables involved, it is not possible to isolate the effectiveness of advertising in any television program in particular.

Most of the executives admit that they believe in the possibility of associating a certain type of program with certain brands, but they point out that given the way in which publicity is structured nowadays, it is difficult that this may materialize. The publicity is not associated with the content of a program because the same ad is shown at different moments. It is easier to generate an association in cases of publicity placement or when the content of a program is related to a brand.

Even though the breaks for commercials make it difficult to associate brand and content, many of the executives admit that they have withdrawn their sponsorship from programs in which there were extreme contents (sex and violence).

With respect to quality, the executives think that the audience does not relate the quality of a given program with the publicity. Only one of them believes that there are programs and channels which, because of some vulgarity in their contents, may be detrimental to his brand. He mentions the "neighbourhood effect" of not only the contents of the programs themselves, but also of the other ads that are shown in these programs.

The executives consider that defining quality is impossible, as it is a relative concept.

There are some of them who consider that they have no responsibility whatsoever in the quality of open television, whereas others do believe that there is some responsibility –albeit secondary– of the companies that advertise on television.

All things considered, we can conclude from this qualitative analysis that when we speak of the television industry we refer not only to the television channels and their executives. The audience and the advertisers are also a component of this industry. The channels display on screen their supply of programs with which they attract audiences that they subsequently sell to their advertisers. Because of this, TV ratings have become fundamental both for television channels and advertisers. For a channel the rating figures mean sponsors for a program, and for the advertiser, lower costs per contact. But rating alone will not do: advertisers must have information that will allow them to reach a given target group. It is not enough to know how many people are reached: it is also necessary to know who they are.

III. Construction of the Quality Index

On the basis of the theoretical background and qualitative research, we went on to construct an index made up of different views. To do so, we considered it innovative to incorporate into this index the opinion of the audience as expressed in a survey, the performance of the audience by means of TV ratings and the intrinsic quality of the product through a contents analysis.

The following is an account of the main technical aspects of each of the three foundations of the quality index. .

a)   **Survey**: The questionnaire of the survey was constructed by the research team, with consultancy services provided by experts from the company Market Opinion Research International (MORI) that applied and tallied the results of the survey. The technical characteristics of the survey are the following:

– Target segment of the research: Men and women aged between 16 and 80 from socioeconomic groups ABC1, C2, C3 and D, Santiago residents and consumers of open television.
– Personal surveys in homes
– 400 cases
– Margin of error 5%
– Reliability level 95%
– Dates of application:
  • 01/08/2006 to 11/08/2006

b)   **Rating:** The rating figures for the weeks between 17 and 30 July were kindly supplied by Time Ibope (the company that does television audience measurements). The person rating was used as we consider that it shows the behaviour of individuals in a better way.

c)   **Contents analysis:** We analyzed the prime time programs of TVN, Mega, Canal 13, Red Television and Chilevision between 17 and 30 July 2006.

There was an analysis of each of the scenes or sequences of miscellaneous programs, fiction, and reality shows, and each of the journalistic notes in the case of the news programs.

-General Analysis Factsheets: These included information on source of the program, genre and sub-genre (following the typology of the National Television Council), objective of the program and innovation in different aspects.
- News Programs Factsheets: These included information on general aspects of each news note, topics, values and anti-values, justification for the note, number of sources and situations described, to be tallied against closed lists emerging from the prior qualitative study.
- Miscellaneous, Fiction and Reality Shows Factsheets: These recorded information on practically the same aspects as above, save for the sources. These factsheets included information identifying the protagonists of each scene.

With respect to the value assigned to each of these features in the Quality Index, we must make the following points:

-The respondents assigned a mark to different attributes of television in general, the channels and the programs analyzed. In the last case, there were different attributes, depending on whether they were news, miscellaneous or fiction programs, or reality shows. Reality shows were considered as a single unit given the similar characteristics that they present both in their dramatic structure and in their search for audience identification.
-The averages of these attributes for the different categories were integrated into a scale from 0 to 100.
-The person rating is expressed on a scale from 0 to 100.
-In the contents analysis each of the parameters measured in the programs was assigned a value according to what type of audiovisual program it was: news, special reports, miscellaneous or fiction and reality show. From information gleaned from the previous qualitative research, we determined which of these parameters added value to the programme, considering its objective.
-The value assigned to the programmes was also expressed by means of a scale from 0 to 100.

The index, made up from the three baseline components already described, measured the quality of Chilean television between 17 and 30 July 2006. We decided to focus exclusively on prime time television as it is the time that concentrates the highest audience levels[2] and the most important publicity investment. For this reason, the channels make an effort to concentrate in these time-slots what is most suitable for mass television.

The values assigned to these three aspects had the following weightings: both the opinion and the behaviour of persons had a weighting of 30 percent each and the contents analysis a weighting of 40 per cent.   This weighting makes the audience particularly relevant in terms of their opinion (survey) and behaviour (rating) as we, the team of researchers, have the strong conviction that open television has a massive vocation.

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[2] According to figures from the National Television Survey 2005, by the National Television Council, the audience concentrates between 19.00 and 24.00 hours and reaches its peak during the prime time news: 70 per cent of respondents says that they watch television between 21.00 and 22.00 hours on week-days.

1. Main Findings

The following section presents the general results of the index and we shall show some charts presenting specific results of two of the baseline studies: the survey and the contents analysis.   At the end of this section, we shall present the main findings of this research.

A. Survey

With respect to television in general, as can be seen in Chart N°1, the respondents mentioned entertainment and being informed as their main reasons for watching TV. But it is worth noting that something already perceived by the channel executives themselves also had a significant share: the need for company. Among the reasons for watching television 24.95 per cent of respondents mention that they do so to feel accompanied. It is also striking that 21.53 per cent of respondents mentions that they watch television with culture/education as their aim.

Chart N°1

Reasons to watch TV
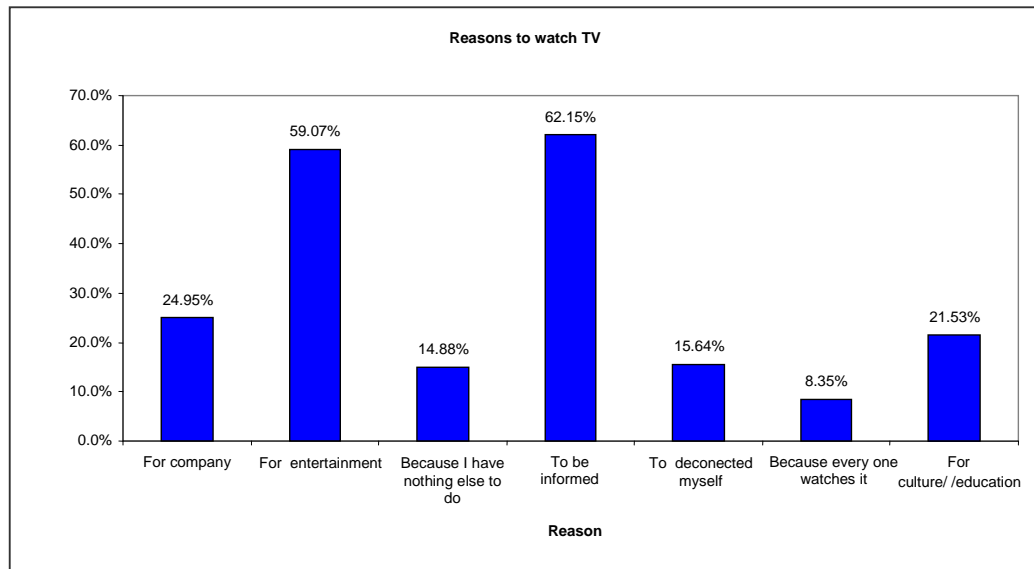
The respondents also say –as can be seen in Chart N°2– that the main objectives of Chilean television should be to educate, inform and entertain. The qualitative analysis previously done provides a context for these figures as audiences consider that, on the one hand, TV has to deliver culture and, at the same time be entertaining, and, on the other, that education also involves certain aspects of social and daily life.
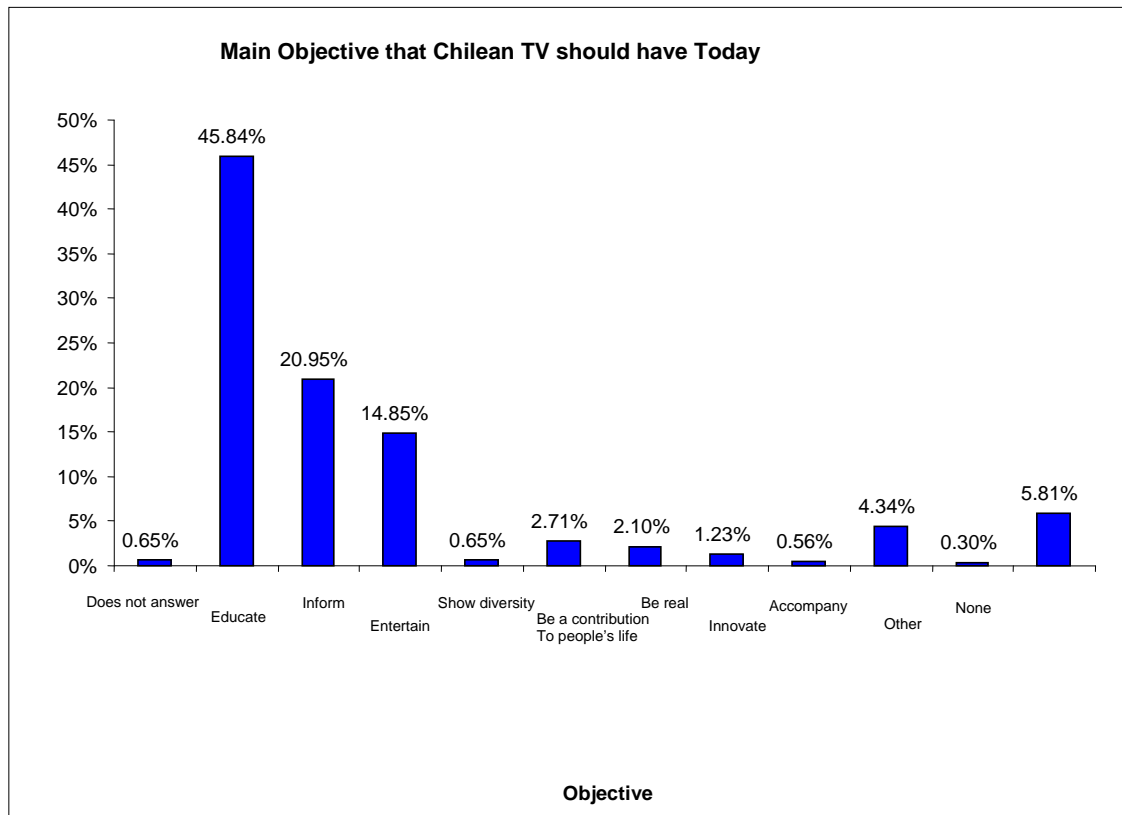
Chart N°2

Chart Nº 3, shows part of a series of phrases that represents the presence or absence of certain quality attributes of open television. A scale from 1 to 10 was used for this question, with 1 meaning "I completely agree" with the phrase on the left, and 10 meaning "I completely agree" with the phrase on the right.

Although in this Chart television is on the whole assessed as slightly above average, 5.25, people value its role as provider of entertainment and news –the two main reasons for watching television– more positively than negatively. In turn, people evaluate in a relatively positive way the diversity shown on television. However, pluralism is negatively assessed.
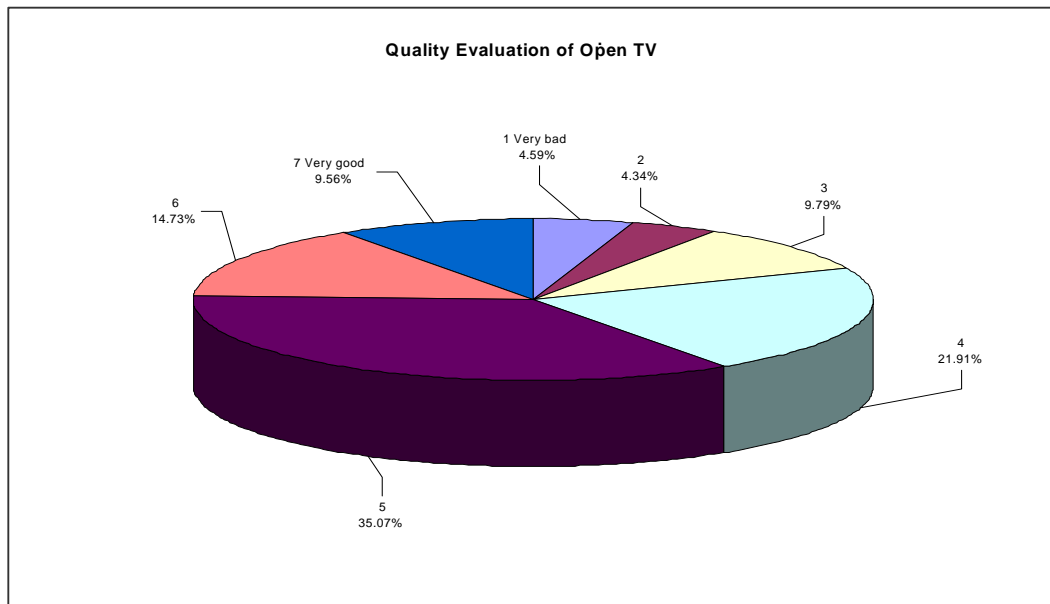
Chart N°3
Points of View on Chilean TV

	Average	
"Chilean TV shows programs of interest to a minority of the people"	5.38	"Chilean TV shows programs of interest to the majority of the people"
"Chilean TV does not show diverse types of people and situations (poverty, homosexuality, etc)."	6.26	"Chilean TV shows diverse types of people and situations (poverty, homosexuality, etc)."
"Chilean TV shows the opinion of few groups."	4.64	"Chilean TV shows the opinion of every single group."
"Television does not keep me informed."	6.79	"Television keeps me informed."
"Television does not entertain me."	6.63	"Television entertains me."
"I do not feel at all identified with what I watch on Chilean TV."	4.99	"I feel very identified with what I watch on Chilean TV."
"Television does not provide me with conversation topics."	5.99	"Television provides me with conversation topics."
"Chilean TV contributes with nothing to me."	5.47	"Chilean TV makes a great contribution to me."
General Score	**5.25**	

In general, on the basis of the attributes listed above, viewers assess television as average to middling. The same viewers, when assessing television as a whole (Chart N°4), without dissaggregating the attributes, do not evaluate television in a definitely positive way either.

Chart N°4

Quality Evaluation of Open TV

- 1 Very bad 4.59%
- 2 4.34%
- 3 9.79%
- 4 21.91%
- 5 35.07%
- 6 14.73%
- 7 Very good 9.56%

B. Contents Analysis

We shall now present some general aspects of the contents analysis, divided according to genre. For the better understanding of the Charts shown below, it is important to mention that in Chile there are five open television channels, which concentrate the highest rating percentages. One of them, Televisión Nacional de Chile (TVN), belongs to the State; Channel 13 belongs to the Catholic University of Chile; Chilevisión (Channel 11) and Mega (Channel 9) are television networks that belong to important local entrepreneurs; and, in turn, Red Televisión (Channel 4) is a private channel owned by a Latin American mass media baron.

News Programs

In this Chart we sought to emphasize one aspect of the hierarchization of the selection criteria of the different prime time news programs by highlighting the topics that are more frequently selected by the different channels. It is interesting to note the importance that all the television networks assign to sports. In TVN, news dealing with crime has a high coverage, the same as in Chilevisión. During the weeks analyzed, Channel 13 was the channel that had the highest coverage of news related to politics.

Chart N°5

Primer Time News Themes
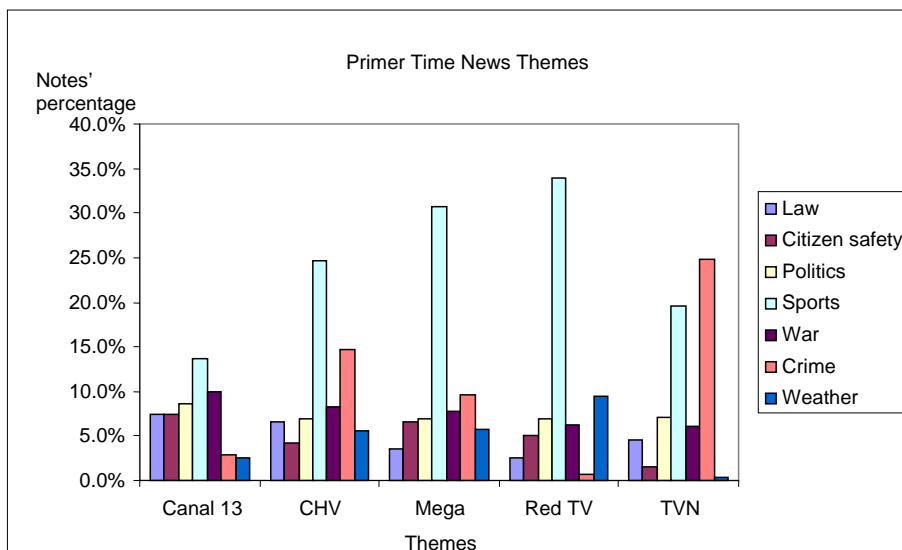
As for the constituent elements of the news (Chart N°6), it is worth noting the importance of emotion in Mega. Conflict is quite present in TVN and Channel 13, but this channel also gives importance to rapport.

Chart N°6

Justification of Notes
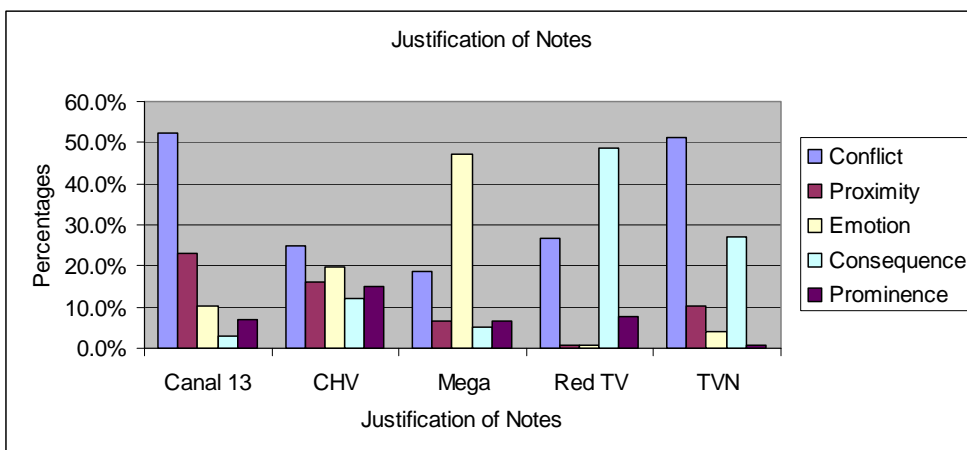
**Fiction and Reality Shows**

In this type of programs the most frequent topics were always the same: work, friendship, family and love affairs. We believe that this is because, as will be seen in the case of values, these topics are the most closely related to the daily life of people and, in general, both fiction and reality shows seek to attain audience identification.

Chart N°7
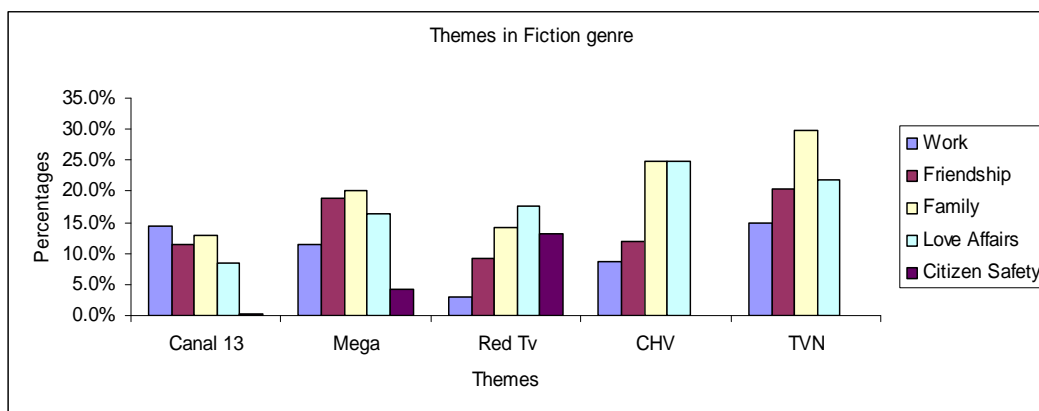
In terms of values –Chart N°8- there is also a group that gets repeated in practically all the channels: love, effort, courage, solidarity and honesty. These are values associated with the daily life of the people.

Chart N°8
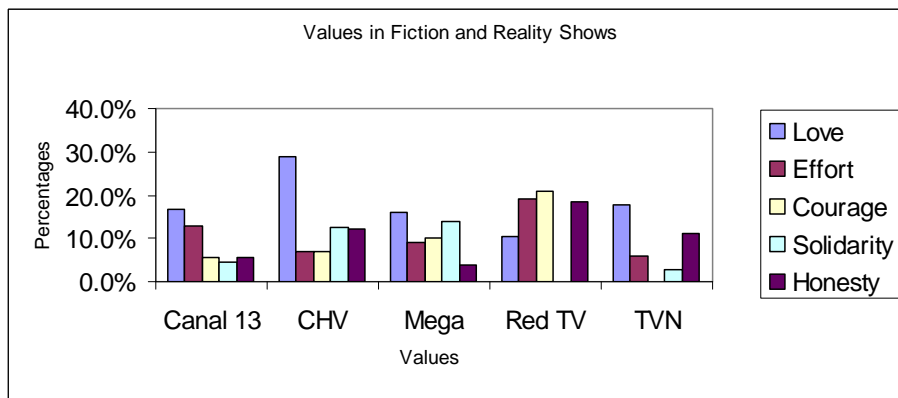
With respect to justification/prevailing emotion in the scene (Chart N°9), we can say that both in Channel 13 and in TVN it is conflict that prevails, whereas emotion does so in Mega y Chilevisión.

Chart N°9

Miscellaneous Programs

The themes in this type of programs, as shown in Chart N°10, are mainly humour or comedy situations, contests/quiz shows the environment (there were two programs on animals when the measurement took place), show business and showbiz chat shows.
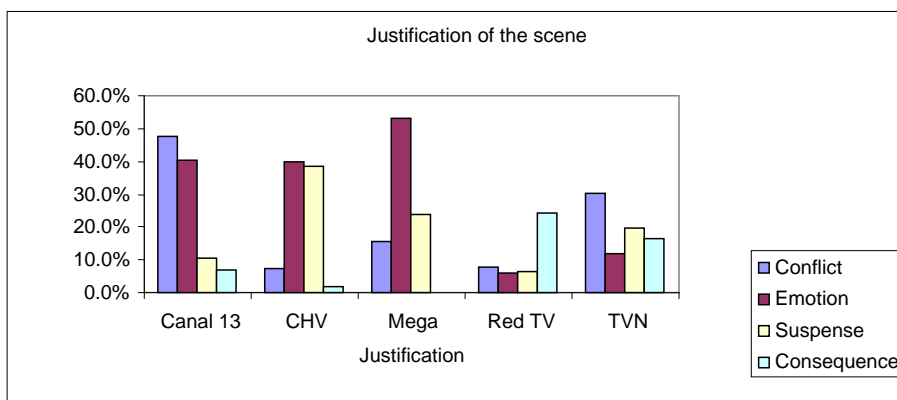
Chart N°10
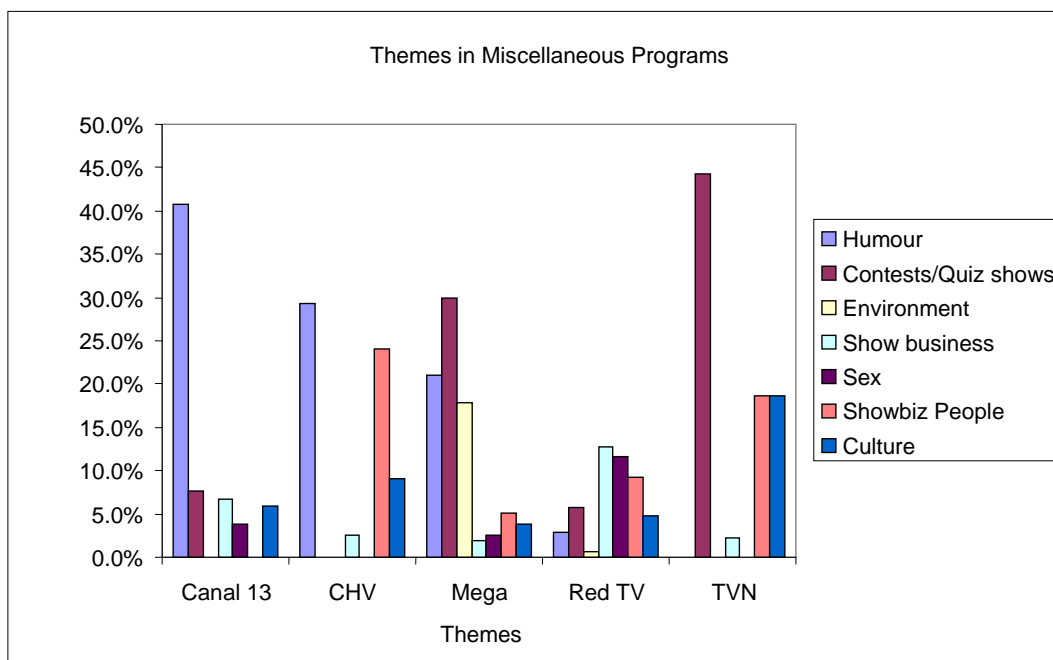
As for predominating values (Chart N°11), they are very similar to those of fiction and reality shows. It is worth noting, however, that values such as honesty and sincerity are very much associated with chat shows in which there are guests who make confessions of a personal kind. Care for the environment appears very strongly in Mega because of its programs "Entretemundo" and "La Ley de la Selva".

Chart N°11

Values in Miscellaneous Programs
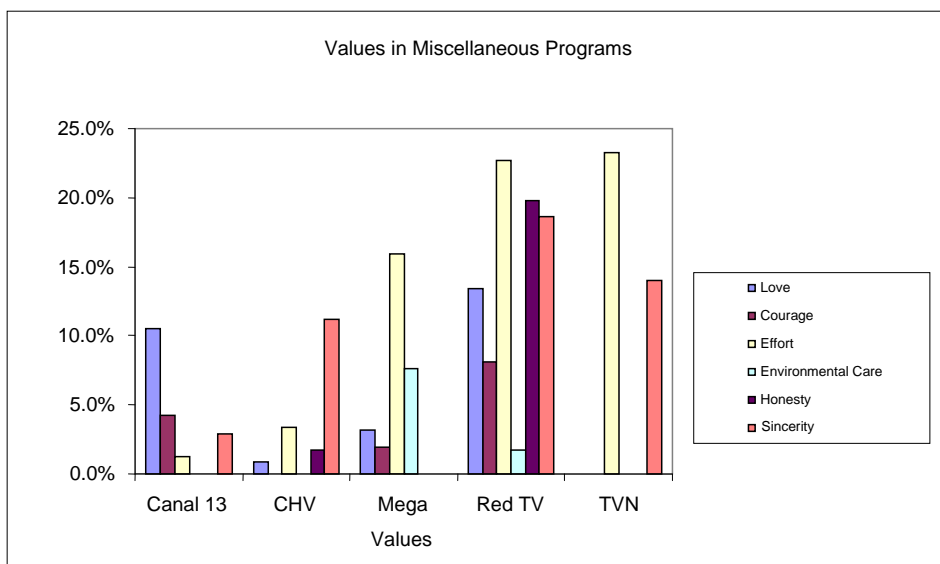
In general, it is emotion that prevails in this type of program (Chart N°12), and in TVN, there is also suspense, because of the program "Chile elige".

Chart N°12

Justification in Miscellaneous Programs
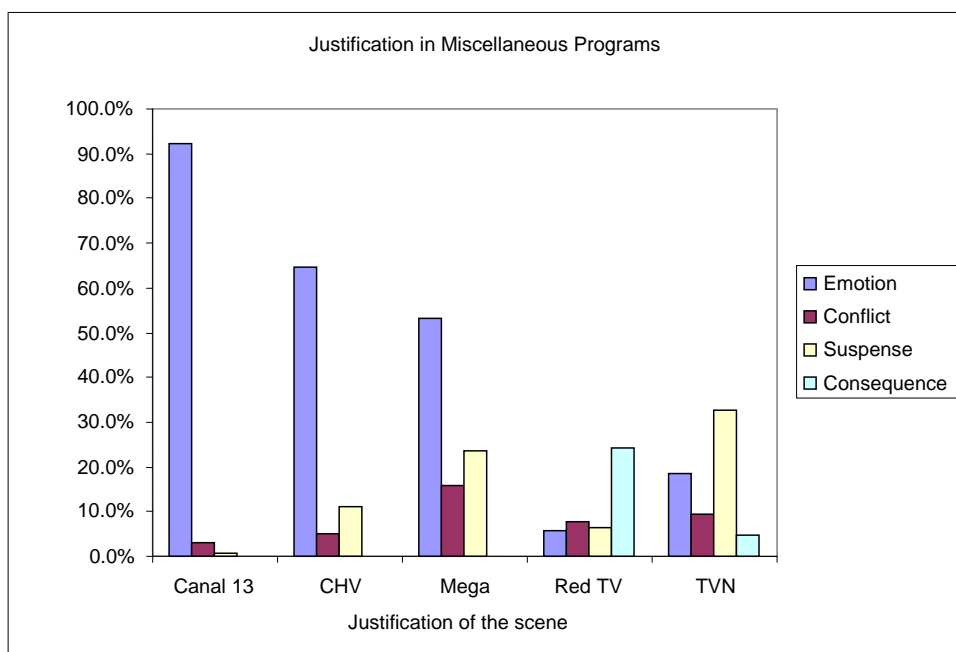
C. Quality Index of Open Television in Chile

The following section presents the results of the Quality Index of Open Television in Chile Generated by the Faculty of Communication and the Faculty of Business and Economics of the Universidad de los Andes, with funding from the Fondo de Ayuda a la Investigación (a fund for the promotion of research) of the Universidad de los Andes.

The index was defined in terms of percentages and, according to the defined weighing and a scale of results shown in Chart Nº13, it determined whether the quality of television, in general, was bad, average, good, or very good.

Chart N° 13

Range		
Bad	0%	25%
Average	25%	50%
Good	50%	75%
Very Good	75%	100%

Chart N°14 shows that the only news programs within the range of average are "Meganoticias" and "Cero Horas". However, it is necessary to say that this measurement was carried out before the changes in the press department of Mega.

Chart N°14
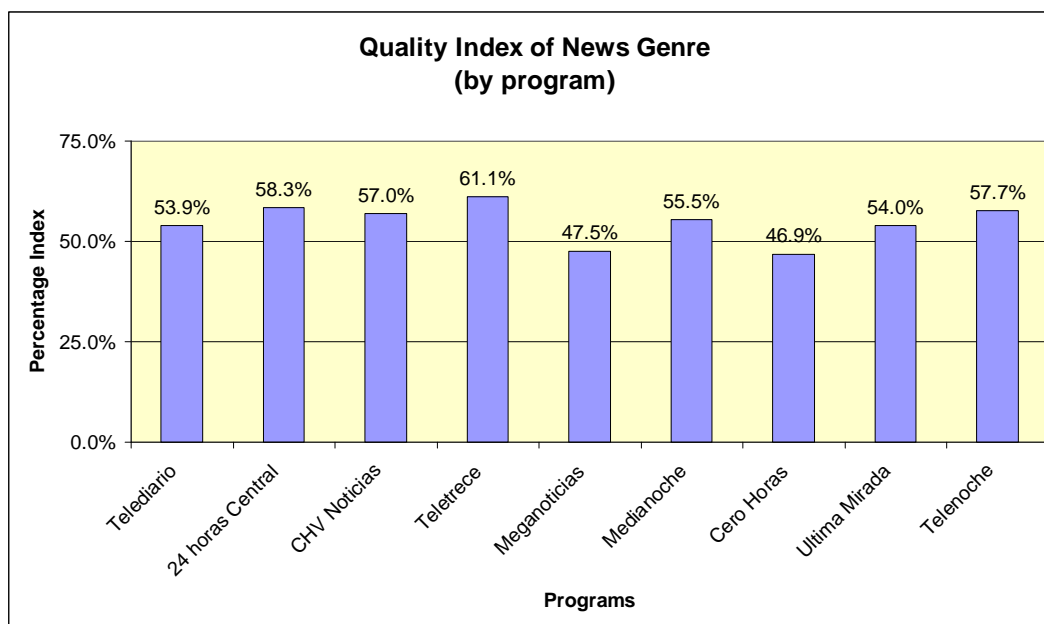
As can be observed in Chart N°15, the best evaluated programs are those which were spontaneously evaluated as quality programs in the qualitative study.

Chart N°15

Quality Index Special Reports (by program)
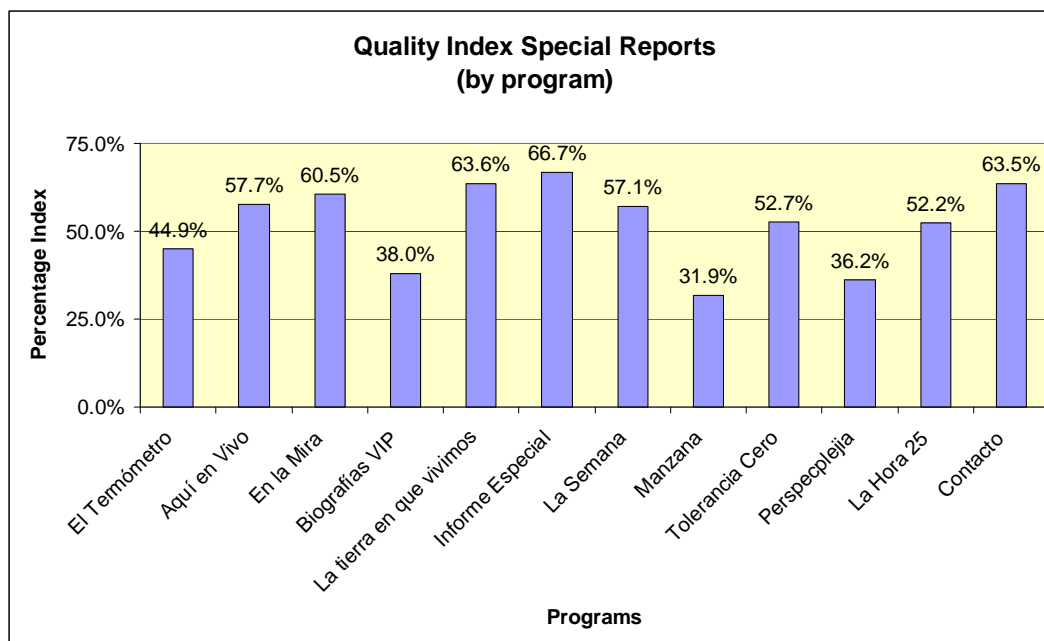
In this graph, we can see that the best evaluated miscellaneous programs are those that bear some relation with education or information, such as "La Ley de la Selva", "Entretemundo" and "Quién Merece Ser Millonario" , which have a family format.

Chart N°16

Quality Index Miscellaneous Genre (by program)
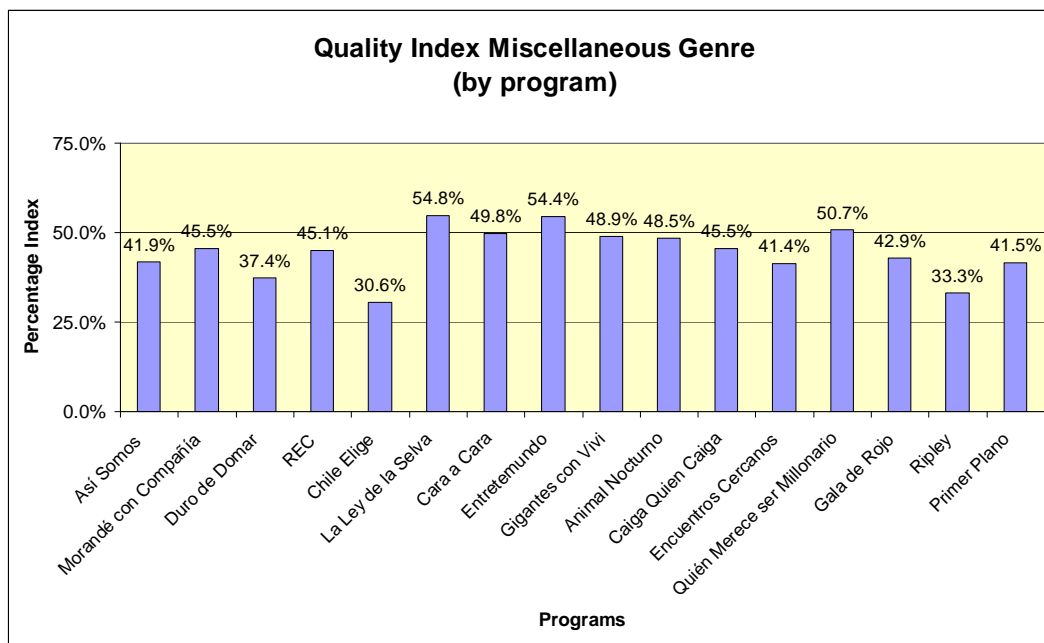
Graph N°17 shows the clear difference between domestic and foreign series, the latter with lower quality indexes due to their low identification with the target audience.

Chart N°17

**Quality Index Fiction Genre
(by program)**

Percentage Index vs *Programs*

Program	Index
Chocolate con Pimienta	53.4%
Cómplices	58.9%
Casado con Hijos	55.8%
Descarado	47.3%
Nip Tuck	47.8%
Esas Mujeres	59.6%
Enigma	52.5%
Culpable o Inocente	52.0%
CSI	44.9%
Expedición Robinson	59.6%
Vértigo en la Calle	53.8%
Vértigo Extremo	54.8%
Dr. House	48.1%
Los 4.400	49.5%
La Vida es una Lotería	55.0%
Historias de Eva	50.2%
Teatro en Chilevisión	45.0%
Sex and the City	53.1%
Lost	47.8%
Huaquimán y Tolosa	53.4%

Graph N°18 shows the news programs as the best evaluated of all. Miscellaneous programs only manage to be evaluated as "Average". This represents an opportunity window for channels as the audience expects that even this kind of program should convey information that may be valuable for their decision-making and should be a positive contribution to their daily life.

Chart N°18

Quality Index by Genre

Percentage Index vs *Genre*

Genre	Index
Special Reports	52.1%
News Programs	54.7%
Miscellaneous	44.5%
Fiction	52.1%
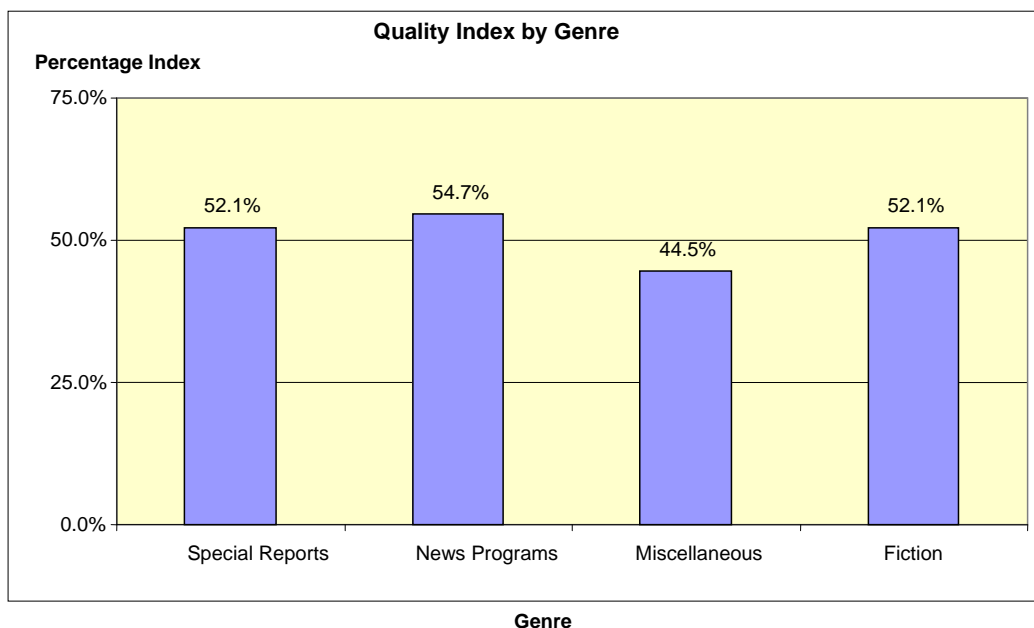
Chart Nº19 demonstrates that despite the narrow competition, TVN is the only channel whose quality is rated as Good.

Chart N°19

Quality Index by Channel

Percentage Index

CANAL 13	48%
CHILEVISION	46%
MEGA	49%
RED TV	44%
TVN	52%

Channels
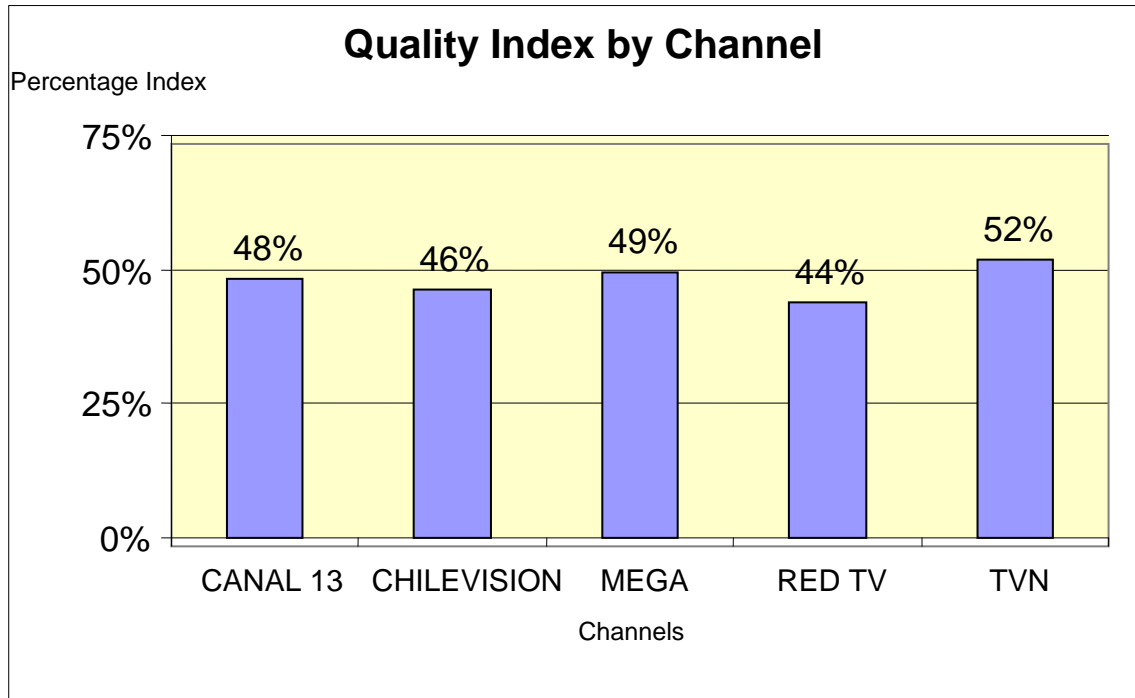
QUALITY OF OPEN TELEVISION IN CHILE

When the overall evaluation of television is carried out, its quality is assessed as average to middling on the basis of the variables considered (survey, rating and content analysis).

This is consistent with the disaggregated evaluations of channels, genres and programs. In these cases, the quality is relatively better evaluated, albeit always within the range of average.

43.26% Average

4. Conclusions

Chilean open television is evaluated as average to middling, which is consistent with the assessment resulting from the qualitative study. This evaluation agrees with the survey and also with its associated rating, so we can conclude that those people who watch open television watch the best programs on offer.

In terms of channels TVN is the best evaluated by a narrow margin, despite being within the category of "good". Red Televisión and Chilevisión get the poorest assessments.

As for program genres, it is interesting to see that news programs should be the best evaluated. Miscellaneous programs, however, were the only ones with an average to middling evaluation. This finding offers particular grounds for concern given that this genre is especially suitable for television as it appeals mainly to emotions: it is from this genre that the audience – as shown by the qualitative study– expects contributions having to do with humane values, education for daily life, emotion, etc.

It is worth mentioning that "Teletrece" and "24 Horas Central" are the best evaluated news programs. According to the content analysis, in these news programs what prevails as an element of the news is conflict. In turn, "Meganoticias", which is the worst evaluated news program, places its stress on emotion. In the case of Channel 13, it is interesting to note how it generates rapport. We may even venture that its good evaluation lies in achieving closeness through rapport and not emotion that is always more raw.

The brand image of special report programs in general coincides with the position of these programs in the index. In the qualitative study, "Informe especial", "Contacto" and "La tierra en que vivimos" were mentioned several times by the different respondents as quality programs and in fact, they were the best assessed according to the index defined.

Fiction and reality shows appear to point out that identification is very important. This might be the reason why foreign series are the worst assessed on the index, and might also explain the good evaluation of the reality show "Expedición Robinson". Despite this impression, it is important to stress that identification is difficult to measure on any survey, as it is an item that has to do with feelings that are difficult to operationalize. On the contrary, in the contents analysis it is possible to define certain variables that could be associated with identification.

The information obtained makes it possible to start looking for relations between the quality of the channels and of the programs and their possible impact on the advertisers' brand image. This is particularly relevant in a scenario in which the audience will increasingly tend to fragment and the advertisers will have to look for more accurate instruments that contribute with brand value.

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The Current State of Hispanic Media Buying: How…Where…By Whom?

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Abstract

A proposal for looking into the purchasing habits of media personnel involved with the buying of media targeted to the Hispanic demographic. The researcher intends to use a web-based survey to investigate the types of media used, the language in which the advertisement is presented and the type of agency making the purchase. Results will give insight into the current status of Hispanic-oriented message dissemination.

The Current State of Hispanic Media Buying: How…Where…By Whom?

It is hard to ignore the growing purchasing power of the Hispanic demographic. As the Hispanic population increased to an estimated 44.7 million people in 2006, comprising almost 15% of the US population (From 200 million, 2006), their purchasing power has surpassed $700 billion and is expected to reach $1 trillion by 2010 (Hispanic Purchasing, 2004). Reaching this audience is highly desirable for any advertiser wishing to gain customers and increase its market share and brand equity. Gronhaug and Rostvig (1978) confirmed that the relationship between the target audience and the advertising message is an important one, and that is most definitely the case when targeting Hispanics.

Korzenny and Korzenny (2005) reported that the highly sought after Hispanic audience does not necessarily have to be reached through the Spanish language. Armbruster (2006) has reported that Hispanics are just as likely to consume English-language media as they are Spanish-language media. This becomes more apparent as Hispanics become further acculturated into the mainstream U.S. environment (Hernandez, & Newman, 1992). Older and recently immigrated Hispanics are the highest consumers of Spanish-language media (Armbruster, 2006). Herbig and Yelkur (1997) stated that the more affluent the Hispanic consumer is, the less likely they are to identify with Spanish-language messages and media.

There is little doubt that advertisers are specifically targeting Hispanics with their advertising campaigns. What is open for investigation is how these media purchases are being made. After all, the most creative campaign can not work without reaching the correct audience. It has been reported that the best way to reach Hispanics is through broadcast media (Goodson, & Shaver, 1994; Herbig, & Yelkur, 1997) although print and radio advertising is gaining favor. This study attempts to discover how, where, and by whom, media targeted to Hispanics is placed and purchased. Research in this area serves as a benefit to both marketers and media outlets in determining the avenues for which Hispanic-targeted messages are disseminated.

Literature Review

The Hispanic market is typically segmented into two groups: American-born and immigrants. Levels of assimilation vary vastly between groups and each faces their own challenges and preferences with the media. As advertisers reach out to these groups, media buyers and creative directors are faced with the challenge of how best to reach this audience and gain their trust and support. The following discussion takes a general look at media buying, minority media, language choices and industry trends before narrowing to questions of where Hispanic-targeted media decisions originate and are disseminated.

Media Buying

There is little empirical research that investigates the area of media planning and buying, and even less that looks at the buying of media targeted to Hispanics. Much research that has appeared with regards to media buying and strategies has focused on case studies and advertising buys during political campaigns (see for example West, Kern, Alger, & Goggin, 1995; Quinn, & Kivijarv, 2005). McMellon and Eftimov (2004) defined a media buyer's goal as achieving the best price for advertising time and space, as well as the best positions within that medium, to efficiently and effectively achieve advertisers' objectives. Media buyers rely on research from their own agencies as well as outside sources for analyses of different media vehicles to

determine the best locations for particular messages. Some difficulty in accurately studying media buying arises from the challenge of gaining access to information. In political campaigns spending is a matter of public record, but in the private sector much of this type of information is considered proprietary (Goodson, & Shaver, 1994; West et al., 1995). Thus, the abundance of analyses on political media spending and the lack of information focusing on commercial advertising expenditures.

Media planning and buying is important to the success of a campaign because "most advertising funds go to buy media space and time and it is important that messages reach large numbers of target customers at the right time" (Hornik, 1980, p. 33). Marketers erroneously believed that mainstream advertising campaigns would trickle down to Hispanic consumers (Consoli and Bachman, 1999). Few targeted marketing efforts were conducted until recent research highlighted the effectiveness of targeted advertising to reach ethnic groups.

Buying advertising space and time continues to evolve as media choices are fragmented and outlets converge (McMellon, & Eftimov, 2005). Advertisers are pressuring their agencies for better media effectiveness and the Internet has created a new and interesting angle that has yet to be fully tested. Furthermore, according to McMellon and Eftimov (2005), advertising and media agencies are consolidating in an attempt to gain better media buying power. Still, the media buying process has not been the subject of much academic literature, although the trade presses do discuss some elements of the negotiation process.

Turk and Katz (1992) conducted an overview of media planning and buying changes during the late 1980s. At no point did they address the growing Hispanic demographic. They allude to media opportunities in Europe or Asia and the integration of marketing campaigns. Technology and convergence are mentioned, as are the growing number of media choices. The late 1980s is the time that Davila points to as being a period of marked growth in the era of Hispanic advertising and marketing and the lack of mention by Turk and Katz is disturbing. Goodson and Shaver (1994) reported that trade publications began covering Hispanic marketing issues more frequently and thoroughly in the 1980s. Many books were published about reaching the Hispanic audience, and media resources began addressing Hispanic media and markets. The oversight of the Hispanic market and audience is indicative of the advertising environment at the time – advertisers were concentrated on the general market because of the buoyancy of the economy.

Ayala (2007) estimated that more than $150 billion was spent on advertising in the United States in 2006; only 3.3% of that amount was devoted to ethnic media. In fact, this perceived bias against minority media prompted the call for a "code of conduct" among advertising agencies in an effort to eliminate, or at least discourage, "no urban" and "no Hispanic" mandates from marketers. No such code currently exists; however, the American Association of Advertising Agencies does have a policy which prohibits discrimination against any medium or audience (Teinowitz, 1999). As a whole, spending on the Hispanic demographic has increased over the past several years, but the majority of advertising budgets are still directed at a general market audience. Most advertisers have a tendency to market to minority audiences through traditional media outlets (Ayala, 2007). Wood (2006) suggested that the best way to maximize advertising investments to the Hispanic demographic was to understand which segment an advertiser is suited to targeting and adjusting advertising budgets accordingly.

As early as the 1960s advertising agencies were established with the specific purpose of targeting Hispanics (Davila, 2001). Many of the original Hispanic agencies were founded by Cuban immigrants who had been involved in advertising and marketing before arriving in the

United States. As the agencies flourished, talent was imported from successful advertising houses in Latin American countries with the intention of creating advertising campaigns targeted to Hispanic-Americans (Davila, 2001). Success has been mixed, but enough notice has been taken that advertising conglomerates have merged with and integrated Hispanic agencies into its fold.

Minority Media

In 2000, the Hispanic Newspaper Network filed a $1 billion lawsuit against three major advertising agencies. According to Fine and Petrecca (2000), the agencies excluded minority-owned publications from media buys for federal government accounts they handled. The suit stated that the agencies were in charge of $700 million of government spending and that less than $1 million was allocated to the newspaper plaintiffs. In defense of the agencies' media choices, a buyer is quoted as saying that Latino-owned publications are not always chosen to deliver messages that are aimed at the Hispanic market (Fine, & Petrecca, 2000). A local mass market metropolitan daily newspaper many have a higher market penetration and actually reach more of the Hispanic audience. Media consumption reporting services Nielsen Media Research and Arbitron Company have also come under fire for not accurately representing the Hispanic market. Nielsen Media Research unveiled a new tool to measure the reach and frequency of Hispanic television in 2004, the Nielsen Hispanic-American Television Index (NHTI). The service was available in 19 key markets and the information was accessed, for a fee, through Nielsen's Internet portal (Bachman, 2004). The main Nielsen website currently lists the top 10 Hispanic programs for the week, based on the NHTI, but the NHTI Web site appears not to have been updated since January 2004.

Goodson and Shaver (1994) reported that Spanish-language media buys are much less expensive than general-market buys, and this may be one reason that expenditures are not as high when targeting Hispanics in their own languages. Additionally, they said that national advertisers are still reluctant to allocate large budgets to a demographic they are not overly familiar with and do not view as being long-term customers. This is easily contradicted by a large amount of Hispanic consumer behavioral research which indicates that Hispanic brand loyalty is greater than that of other demographic groups (Velarde-Wong, 2004). Stringer (2006) believed that the Hispanic market has been a challenge to marketers because of the diversity of the demographic, along with ignorance of the language and cultural differences.

Conversely, Torres and Gelb (2002) reported that major brands have instituted special divisions to develop marketing strategies in an effort to tap ethnic markets. According to Santiago & Valdes Solutions (2002), corporations are increasing advertising investments to target Hispanics because as the Hispanic population continues to grow, so does their purchasing power. Stringer (2006) cited growth in Ford and General Motors' ethnic spending in 2005, a refocus of budgets in an effort to reach more minorities with its marketing efforts. Kinnier (2006) claimed that to be successful in the ever-changing and expanding Hispanic market, advertisers need:

> "a keen knowledge of the cultural nuances, media habits, situations and needs of US Hispanics, regardless of age, level of acculturation or language preference," and the "buying power of young Latinos is significantly impacting marketing decisions such as advertising language choices, media buying and the incorporation of grassroots outreach versus traditional marketing methods" (¶ 10).

Ofori (1998) reported that radio stations with programming targeted at minority listeners earn less revenue per listener, and minority-owned stations generally earn less overall revenue, than their general market counterparts. Additionally, more than half of the time purchased on minority-formatted and owned stations is purchased at a discount; up to an average of 59% per spot less. Ofori (1998) does suggest that the Hispanic audience may be overlooked due to underestimations of their disposable income. However, advertisers interviewed by Goodwin and Shaver (1994) reported that they relied on the advertising agencies and media contacts (both general market and minority) when making determinations on what media to buy.

Companies such as Adlink in Los Angeles have developed to streamline Hispanic media purchases. Adlink offers insertions on up to 40 Latino-targeted television and cable channels in the Los Angeles area (Forkan, 2000). The company has a sales force that targets companies with existing Hispanic media budgets, as well as those interested in translating Anglo campaigns to reach the Hispanic demographic. The Los Angeles market may be less prone to translation errors due to the high concentration of Mexicans, rather than a more diverse Hispanic population as can be found in Miami or New York (Forkan, 2000). Care must be taken when translating a campaign from English to Spanish. Flamm (2005) cautioned that a voiceover translation can be construed at insulting in some instances.

Language

The prevailing view in the advertising industry is that to reach the Hispanic market, the best way to advertise is in Spanish. Hernandez and Newman (1992) discovered that this may not actually be the case. They found that it is more effective to advertise to Hispanics in their dominant language, whether that is English or Spanish. Their review of literature found that the key to reaching Hispanics may actually be in the use of cultural cues rather than language.

Language and media usage may be tied to acculturation levels, according to Hernandez and Newman (1992). Hispanics who are highly acculturated, those who have adapted to the culture around them rather than the one in which they were raised, are more likely to use English-language media. Hernandez and Newman (1992) reported that several studies have shown that Hispanics do prefer to be advertised to in Spanish, but noted that each study had used Spanish-dominant speakers as a sample. They stand by their claim that advertising to the Hispanic demographic is most effective when the message is delivered in the dominant language – English-dominant Hispanics can be best reached with English-language messages and Spanish-dominant Hispanics can be best reached with Spanish-language messages. Goodson and Shaver (1993) concurred, stating that for advertising to be effective, the Hispanic audience should be addressed in their primary (dominant) language.

Hernandez and Newman (1992) felt that the notion of Spanish being the best language with which to reach Hispanics was being perpetuated by Hispanic advertising agencies and Hispanic media outlets. For example, Hoy (the leading national Spanish-language daily newspaper) commissioned a study that found that 70% of Hispanics read Spanish-language newspapers "frequently or occasionally" (Posada, 2005). It was also reported that the study "confirmed that Spanish-language newspapers are a primary source for Hispanics when they plan a purchase" (¶ 2). The study was conducted on Spanish-dominant or bilingual Hispanics in major urban areas. This is a Spanish language medium citing consumption of Spanish language media. It is to be expected that they want themselves to be presented in the most favorable light. If the

same study was conducted on English-dominant Hispanics, or those in rural areas, the findings would probably be somewhat different. Furthermore, MarketingyMedios.com, the online Hispanic version of AdWeek, reported that advertising spending on Spanish language media could be fettered as the bilingual population increases and marketers change their media selections to reach this segment ("Internet, Hispanic," 2006).

Hernandez and Newman (1992) stated that Hispanic agencies agree that the numbers of English-dominant Hispanics are growing, but they are not convinced of the profit potential when targeting the Hispanic segment in English. Tiegel (2005) reported that the Orci agency, which handles clients such as Honda, Allstate and Johnson & Johnson, has been successful in using both English- and Spanish-language campaigns to target Hispanics. The English-language sports are placed on local channels and selected networks that carry shows indexing high among Latino viewers. This success may entice other Hispanic agencies to broaden their message delivery vehicles.

Full service agencies have dominated the media buying landscape for the Hispanic market (Wentz, 2006). Many general market shops have developed specialist agencies to handle media buys, but Hispanic agencies have strived to remain full service. As demand increases for multi-cultural marketing many buyers think that agencies will have to make some significant changes (Wentz, 2006). Advertising agencies will want to ensure that they have "alliances or wholly owned subsidiaries that are knowledgeable about multi-cultural marketing" to be equipped to best serve its clients (Vence, 2004, p. 17). Peterson (2006) has stated that senior level executives have realized the value of the Hispanic market and are creating specialized divisions within marketing departments and advertising agencies.

Advocates of Spanish-language advertising point to the continuous influx of immigrants (both legal and illegal) which makes the use of native languages necessary (Wentz, 2005). However, pro English-language marketers report that most second- and third-generation Hispanics are not watching '*Sabado Gigante'* but are tuned into '*CSI'* and '*Law and Order*", "just like the regular white folks" (Wentz, 2005, ¶ 7).

Hispanic Agencies and Media

Spanish-language media outlets are courting agencies and advertisers, making them aware of the huge potential revenue streams that are available in the largely untapped Hispanic consumer base. According to Torres and Gelb (2002), blue chip companies have finally recognized the potential of the Hispanic market in the United States. The 2000 census provided validation of the size and strength of the Hispanic demographic. Goodson and Shaver (1994) reported that many media buyers rely on research figures from Telemundo and Univision when making purchasing decisions. The livelihoods of Hispanic advertising agencies and media outlets have been largely tied to its Spanish language capabilities (Hernandez, & Newman, 1992). Advertisers have been reluctant, although willing, to allocate budgets to targets Hispanics in Spanish, but only those with large Hispanic consumer bases have been willing to extend or increase budgets to include English-language messages (Fisher, 1990).

Tiegel (2005) reported that Hispanic advertising agencies are responding to the cultural diversity of the growing Hispanic population by developing new creative concepts. Advertising is being generated with updated musical styles to connect with young Hispanic adults and agencies are attempting to appeal to acculturated second- and third-generation bilingual consumers. However, he also claimed that traditional Hispanic agencies are hanging on to the

premise that the best way to reach Hispanics is in their native language; pointing to the fact that Univision carries only Spanish language commercials. Tiegel (2005) offered the counterpoint that Hispanics tend to function in both cultures and marketers' challenges are to find the right storyline that connects with the backgrounds and lifestyles of bilingual and English-dominant Hispanic consumers.

There are almost no media-only Hispanic agencies and much of the Hispanic market media ends up being connected to either the creative or general market agencies. (It is not uncommon for advertisers to have a number of different agencies working on creative, media planning and buying, or some combination of those, at the same time, and/or for different product lines.) Martinez (2005) claimed that many clients are shifting media buying duties from the full-service Hispanic advertising agencies to larger cultural buying services of multinational agencies that they use for other purposes. He believes that Hispanic agencies have become victims of their own success. The agencies have convinced corporations, and general market agencies, that the Hispanic market is growing and has more buying potential that he largely stagnant general market population. General market agencies have ramped up their multicultural services and have lured advertisers who have been feeling the pressure of paying agency fees to multiple vendors (Martinez, 2005).

How to Decide

When making determinations about which media to purchase to reach Hispanic consumers, advertisers tend to lean towards print and television. However, in English or Spanish, Herbig and Yelkur (1997) reported that television appears to be the best way to reach Hispanic consumers. Goodson and Shaver (1994) reported that 80% of the advertising dollars spent on targeting Hispanics goes to broadcast. Hernandez and Newman (1992) reported that markets with large Hispanic populations oftentimes have trouble sustaining a Spanish-language newspaper. San Antonio, for example, has a population which is over 50% Hispanic, but many of the readers are second and third generation residents and tend to be highly acculturated. In contrast, Miami and Los Angeles, areas that have larger recent immigrant populations, as well as high income Hispanics, have successful Spanish-language print publications. LCN Media in Minnesota owns two Spanish-language weekly papers that are targeted to different audiences (Peterson, 2006). *Gente*, all Spanish, is aimed at first generation immigrants. *La Prensa* is bilingual and is geared towards second- or third-generation Hispanics, some of whom only speak English but maintain strong cultural ties.

Advertising spending in some segments of the US Hispanic market has slowed as advertisers consider which Hispanic demographic is the most appropriate for them to target (Wood, 2006). Three major mistakes are commonly committed by marketers attempting to reach the Hispanic audience. These mistakes, as reported by Herbig and Yelkur (1997), are: 1) treating the Hispanic market as an extension of the Anglo market; 2) not understanding the language or using improper Spanish translations; and 3) believing that the same campaign can reach all Hispanics. Agencies who have strictly adopted the Nielsen ratings for Hispanic viewership have suffered according to Russell (2005). There are many Hispanic media outlets with which to efficiency reach the intended audience that do not show up in traditional ratings reports. Russell (2005) contended that the Hispanic market is a cultural concept, not a number concept, and that media buys should reflect this tradition.

According to Herbig and Yelkur (1997) regional companies may be the most effective when targeting a specific group of Hispanics. Cubans, Puerto Ricans, Mexicans and other Latin American nationalities react differently to language, image and cultural cues. However, fundamental similarities do allow national campaigns to project a consistent image to Hispanics nationwide (Herbig, & Yelkur, 1997). Furthermore, Callow and McDonald (2005) determined that the media vehicle should be a consideration when targeting Hispanic audiences. The advertisement should fit with, and follow, the language preferences of the media's target audience. Goodson and Shaver (1994) suggested that print and radio can be readily adapted, at a reasonable cost, and suggested use of promotions and event marketing as a way to customize campaigns for increased recognition in regional and local markets. (It should be noted that some media vehicles, such as Univision and its affiliated television and radio stations, will only allow Spanish-language advertising.) Armbruster (2006) noted that a key to maximizing the effectiveness of an advertisement targeted to Hispanics is that it must provide value and credibility.

Research Questions

As the debate over English-language message and media and Spanish-language message and media continues to be waged, the questions of who is actually buying this media and where is being placed remain unanswered. It has been reported that media buying for ethnic markets tends to follow either the creative or the general market media avenues (Martinez, 2005) and that television is the primary media vehicle with which to reach Hispanic audiences (Goodson, & Shaver, 1994; Herbig, & Yelkur, 1997). This study attempts to validate or nullify these assumptions by asking the following research questions:

RQ1:   What type of agencies (Hispanic or General Market; Full-Service or Media Only) are purchasing Hispanic advertising time and space?

RQ2:   Where is that Hispanic-targeted advertising being placed (Television, Radio or Print)?

RQ3:   What language is being used in the advertising being placed by each type of agency and in each medium?

Method

The population for this study will be personnel at advertising agencies and services that conduct media buying activities. E-mail contact information for each media buyer and/or each advertising agency will be gathered from Advertising Red Book. Each person will be contacted via e-mail with a "cover letter" inviting them to click on a link and be directed to a web-based survey. All e-mail communication will include a statement ensuring that every response will be on a volunteer only basis and all responses to every question will be confidential. The study will be hosted on a server which will allow answers to be downloaded into analysis software programs.

Statistical analysis will be conducted using SPSS for Windows software. General descriptive statistics and Chi-square analyses will be used to explain the findings. The categorical nature of the information being sought precludes the use of more rigorous statistical tests. This study is an exploratory look at media buying practices with relation to Hispanic-

oriented messages and media. Further studies may be able to look into the subject with more focus and rigor.

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Globalization with Latin flavor

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Abstract

Latin America has produced and distributed audiovisual contents that are as popular as those produced in the United States, this is what we call, *globalization with a Latin flavor*. This phenomenon has developed thanks to two elements: the production of *telenovela*s and their distribution to the Hispanic market in the United States and the rest of the world and the international expansion of some of the Hispanic companies. In this context, some media groups have been key players. In concrete, in this paper, we will study the case of Televisa, the largest producer and exporter of *telenovela*s. . A monopoly for over thirty years, Televisa held a privileged position that allowed it to develop competitive advantages on both the domestic and the international markets. Its expansionist strategies toward the United States and Spain opened up new markets that favored expansion by other American groups, as well as by Spanish groups towards America. A study of this market will allow us to confirm the hypothesis that Latin globalization is culturally different than the Anglo-Saxon version, and to understand its specific dimensions and features.

Globalization with Latin flavor

The theorists of globalization criticize this phenomenon because of its imperialistic and unidirectional features coming from the USA (Schiller, 1969, 1991; Wells, 1972; Boyd-Barret, 1977; Dorfman and Mattelart, 1975; Golding and Harris, 1997; Steemers, 2004). Nevertheless, since the seventies, Latin America has produced and distributed audiovisual contents that are as popular as those produced in the United States, this is what we call, *globalization with a Latin flavor*.

According to Havens (2005: 271), "some insist that those long-form melodramas, which often top the ratings throughout Latin America and may last more than two hundred episodes, put the lie to theories of media imperialism because the distinctly non-Western genre has found favor with viewers worldwide". Globalization with a Latin flavor is coming about thanks to two elements: the first, the production of *telenovela*s and their distribution to the Hispanic market in the United States and the rest of the world; the second element is the international presence that Hispanic companies are beginning to achieve. In this context, some media groups have been key players.

In concrete, in this paper, we will study the case of Televisa, the largest producer and exporter of *telenovela*s, not only in Mexico, but also in other countries. A monopoly for over thirty years, Televisa held a privileged position that allowed it to develop competitive advantages on both the domestic and the international markets. Its expansionist strategies toward the United States and Spain opened up new markets that favored expansion by other American groups, as well as by Spanish groups towards America. A study of this market will allow us to confirm the hypothesis that Latin globalization is culturally different than the Anglo-Saxon version, and to understand its specific dimensions and features.

1. The *telenovela*: a universal genre

In this section of the paper, we will analyze the origin of telenovelas in Mexico and its distribution to other American countries and worldwide. Slade and Beckenham (2005) distinguish the main features of this type of television drama and why are so popular in other countries. The origin of the Mexican production industry is very much closed to the birth and development of Televisa. So we will also put attention to the strategies of this conglomerate and its competitor, TV Azteca.

1.1. The origin of Mexican telenovelas

In the same manner as Mexican cinema of the thirties and forties, television production achieved a high quality level thanks to its actors, with their solid theatrical background. *Telenovela*s benefited from the actors' experience in both cinema and theater. When the movie industry began to decline, several actors came to television. Their advantage was that they had no problem changing from one genre to another (Reyes, 1999: 34-37). The format and formula common in theater were later applied to the production of *telenovela*s.

The first *telenovela* produced in Mexico was *Senda Prohibida* in 1958, with 50 thirty-minute episodes transmitted in an evening schedule. Just like the American soap opera, the *telenovela* targeted housewives as its primary audience, and it was sponsored primarily by soap and detergent advertisers. Colgate-Palmolive was the principal advertiser.

Mexican soap operas developed by TSM began to gain international prestige. The two most successful *telenovela*s of that time were *Gutierritos*, the first to be exported to Central and South America, and *Teresa*. In spite of the fact that *telenovela*s had been exported since 1958, in these first years, the quality of the copies was bad and unattractive.

In 1958, the first videorecorder was acquired. This helped improve the quality of the image and favored exports. Towards the end of the fifties, Alberto Noya Reyes invented the teleprompter. This was a receiver with an earphone that allowed actors to learn the dialogues for the innumerable chapters in a *telenovela*. This facilitated the actors' work and reduced production costs, because of the time saved. Thanks to the teleprompter, Mexican television was able to produce even more *telenovela*s. As well as Latin America, telenovelas were exported to the United States.

1.2. Charateristics of telenovelas

The most popular programs, such as imported action series and musical variety programs came face to face with the increasing popularity of the Mexican *telenovela*s of the sixties. Mazziotti (1996: 32) describes the principal characteristic of the *telenovela* as a series of stories centered on the "meeting, losing, and final meeting of a protagonist couple. The denouement of the Latin American *telenovela*- and the canons established with the audience demand a happy end- not only includes the couple's reunion, but, as corresponds to melodramatic morality, this reunion constitutes also the triumph of good over evil".

The characteristics of the *telenovela* can be summarized as follows: the importance of emotions and of dramatic moments in the story, a simple narrative, and a marked difference between the good characters and the bad ones (Mayer, 2003: 481). They also include eccentric characters frequently involved in ironic or unrealistic situations. The story line will include a love story that gives rise to the action. The production of *telenovelas* is faster than that of the series. Approximately 200-250 chapters are produced, with a pace of one chapter a day, whereas the production of series in the United States is done on a weekly basis and usually involve 26 chapters.

In those years, the production of Mexican *telenovela*s went through distinct phases: in the first phase, the stories became more natural, as they began to be filmed on location. In the second phase, the plot followed the classic "Cinderella formula, and finally, the historical *telenovela* became popular.

The name "Cinderella formula" is taken from the classic fairy tale. In this type of *telenovela*s, the audience's sense of moral justice is appealed to. At the end of the story, the principal protagonist has improved her position in life.

The second half of the sixties saw a growth in national television production, not only because *telenovela*s entered prime time, but also due to the appearance of the historical *telenovela*, such as *Sor Juana Inés de la Cruz* and *Maximiliano y Carlota.* In 1967, *La Tormenta* became very popular, thanks to its story line about the War of Reform and the French Intervention. In 1969 *La Constitución* was produced.

1.3. Birth of Televisa and the social telenovela

In 1974 appeared *Mundo de Juguete*, Televisa's first *telenovela* made for children. It was so successful that it broke the previous record of 604 chapters that had existed up to that moment (Reyes, 1999: 70-71). At the same time, the government began producing its own *telenovela*s, transmitted on public television. The first of these was *Les miserables,* inspired by President Echeverría's visit to Paris (Reyes, 1999: 76), and three years later, *Los bandidos de Río Frío*.

The seventies saw the birth of the *telenovela* with social content, or the *telenovela* of *Social Values Reinforcement*, as it was known. The intention was to transmit educational messages through the *telenovelas*, sometimes directly, through epilogues, or through information given within the story (Rumayor, 2004). Torres (1994: 34 – 35) states that the purpose was to modify or reinforce opinions or attitudes towards socially desirable values. Torres also mentions that this kind of soap opera makes the audience identify with the "good" characters and reject the "bad" ones, and imitate behaviors considered socially acceptable. According to Wittebols (2004: 41), "the telenovelas of Latin America often serve to educate or enlighten audiences on issues of the day".

Up to this point, the *telenovela* was still the star product of the Mexican television industry, and Televisa, with its experience in the genre, was the leader in terms of production, transmission and export. Thanks to this, television viewing hours increased domestically, and Mexican culture became known around the world. Melodramatic stories establish a strong personal relationship between the viewer and the story, through emotional twists and dramatic moments in the plot. Solís (1999) mentions that Televisa's productions reflected an ethical code: for many years, language was carefully guarded, with taboo words used only sporadically. Sexist or discriminatory content was avoided, and actresses and female characters were always decently dressed.

Cueva (2002: 71) points out that, due to the *telenovela*'s genre, it was not necessary to innovate in stories. A genre with such an emotional charge, not as rational as other television genres, allowed the producer to continue recycling the same menu with no ill effects. According to Cueva, *telenovela*s were addressed to all social classes in Mexico. Televisa became a specialist in them because they were economically attractive and they were readily accepted by the public.

1.4. The end of Televisa's monopoly

Success, and the lack of any competition during twenty years, explains why Televisa did not bother with innovative or original stories. In 1993, however, the audience had the chance to choose between the *telenovela*s of Televisa, or those of TV Azteca, which were quite different.

Televisa continued to produce *telenovela*s that followed the same outline, regardless of the intended audience, plus the occasional historical production. Televisa took advantage of the characteristics of the genre, previously described, to continuously recycle the successful "Cinderella formula".

On the other hand, TV Azteca began to produce *telenovela*s that were different from its rival's, taking advantage of Televisa's weaknesses and thus constituting a real threat. TV Azteca's content was based on the real concerns of society: the country's economical and political instability, for example, or women's issues, drug trafficking, the end of the ideal of happiness, sexuality, or moral behavior.
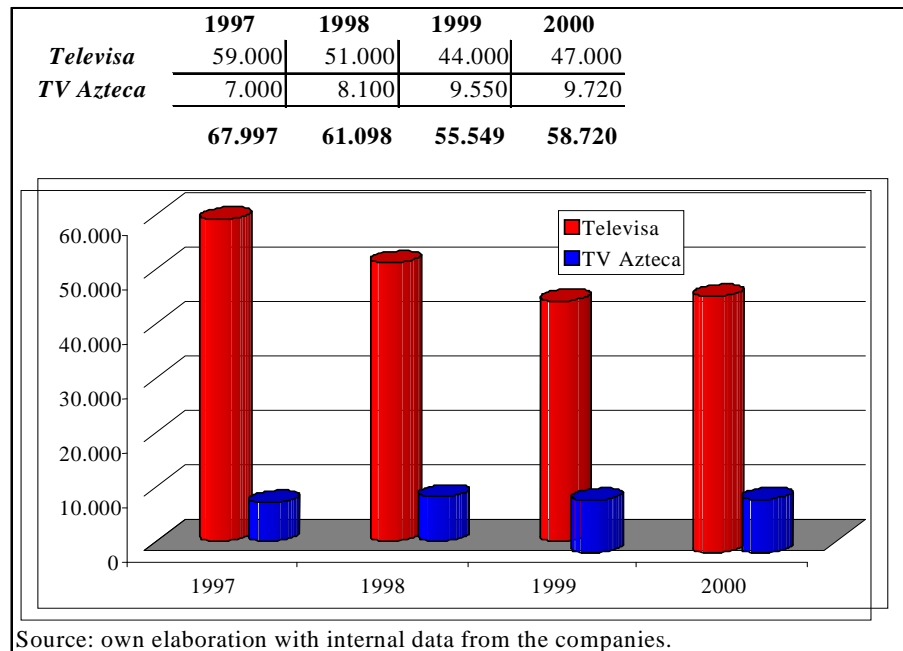
Even though Televisa's *telenovela*s showed divorce, deceit, or abuse of power, they did so in such a way as to make it appear that these things happened to only a few people. The principal difference was that Televisa presented these situations in a cartoonish, exaggerated, or unbelievable tone. They bordered on manichaeism, exaggerating the differences between good and bad characters. TV Azteca, on the other hand, distinguished itself by presenting these events in a more natural way, with colloquial dialogues, and longer scenes where the actors could improvise and move spontaneously, within real locations, such as marketplaces, or lower class neighborhoods.

Of all TV Azteca's offerings, *Mirada de mujer* was the *telenovela* that marked a watershed in the domestic industry. It was also the most polemic television event of the past few years, since it presented a new social role for women, different from the traditional roles presented by Televisa. *Mirada de mujer* questioned the traditional, submissive role of wife and mother, and offered the possibility of a successful professional life for women. Donico (2003) considers *Mirada de mujer* the best Mexican *telenovela* of the past few years: it awoke the sleeping audience, called for social polemics, and agitated the calm waters of melodramas, showing spectators that they could and should change their viewing habits, at the same time that it attracted new generations who were not in the habit of watching the genre, but who were attracted by the topics it touched.

Among the reasons for its success were the story itself, linked to reality, told in a believable way, with three dimensional characters and fresh dialogues. The story was carefully worked by the scriptwriters. The production itself included unconventional (for the genre) camera work with risky movements, and the use of filters and lighting to create a cinematographic texture. The crew was creative and experienced, with a strong professional background, willing to take risks.

Figure 1 shows production levels for the audiovisual industry during the oligopolic years of 1997-2000.

Figure 1. Number of hours produced by Televisa and TV Azteca

	1997	1998	1999	2000
Televisa	59.000	51.000	44.000	47.000
TV Azteca	7.000	8.100	9.550	9.720
	67.997	61.098	55.549	58.720

Source: own elaboration with internal data from the companies.

Although TV Azteca's production levels were not comparable with those of Televisa, little by little the industry leader began to reduce its margins in content creation. Televisa's production slump was directly related to the economic problems it had been suffering since 1994. On the other hand, TV Azteca's increase was thanks to the strategic goal of competing against Televisa and generating its own content.

In spite of having reduced production margins, Televisa continued as leader in the creation of content for the Spanish-speaking market. In 2000, it accounted for 80% of the programming produced in this country. TV Azteca produced the remaining 20%. Televisa's *telenovelas* continued to be the Mexican viewers' favorites, in spite of the new offerings. The average rating of Televisa's thirty best melodramas was 25.72 points, against 9.36 for TV Azteca. Furthermore, Televisa quickly recovered its dominance in prime time schedules. *Mirada de mujer* began to lose ratings, and in April of 1998 it was cancelled.

The struggle for audience preference was not enough to do away with the strategies that Televisa had always found successful, or to avoid recycling the fairy tales. What Televisa did instead was to readapt the stories that had previously gained acceptance. TV Azteca, on its part, began to broadcast programs imported from the rest of Latin America, with actors that had been schooled in Televisa. TV Azteca's greatest failure was *Tentaciones,* a soap of Colombian origin, which addressed a more aggressive topic than was usual. It was dropped quickly due to the social rejection it garnered.

1.5. International distribution

As well as Mexico, there were other countries that produce *telenovelas,* as shown in Figure 2. Argentina, Venezuela, Colombia and Brazil are the main producers of Telenovelas, though Mexico has generated more than 30% of the *telenovelas* produced up to the moment. Their popularity turns them into high revenue products with a great ability to engage the audience and their loyalty. In many cases, they become serious competitors to US series, especially in daytime hours.

Figure 2. Countries producing *telenovelas* (1970-2000)

Source: http://www.serials.ru/telenovelas/en/
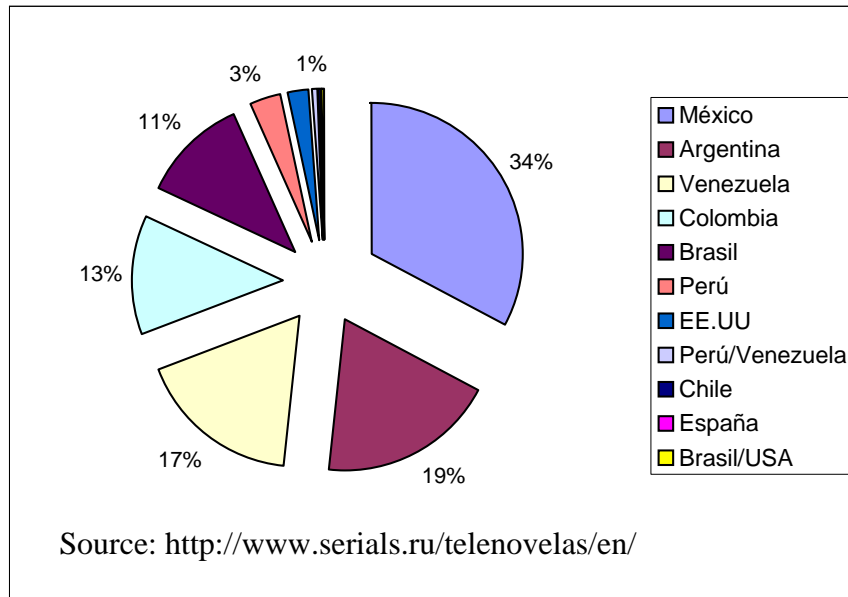
The *telenovela* was the most demanded entertainment product in the sixties. According to Verón (1983: 146), in Venezuela, in 1964, 20% of programming time was devoted to *telenovela*s, and in 1967, one of Caracas' stations devoted 43% of its time to this kind of broadcast.

Although Mexican *telenovelas* were sold to other countries from the beginning, other producers from Latin America began to export content. The Venezuelan *telenovela Cristal* was the first foreign import to compete head to head against Mexican productions. According to Fernández and Paxman (2000: 135 – 137), *Simplemente María,* which the Peruvian company Panamericana exported to fourteen other countries, was even more successful in Mexico than it had been in its country of origin.

Though the production of telenovelas began in the sixties, in the nineties were produced more than 40% and in the last decade, more than 52 % of the telenovelas produced. This tendency has been favored by the development of private television, the opening-up of the Eastern European countries, the progress of new technologies –specially satellite, cable and terrestrial digital television— and the need of Latin American companies to look for new sources of income. The demand of new television contents explains the fact that many channels wanted to include in their offer the most popular Latin American *telenovelas*, which are attractive for a wide sector of the audience and which can be acquired with a low economic cost. They are low-cost and long-running programs, able to held a committed audience. Most of these telenovelas were produced to the international market.

The distribution in Europe of *telenovelas* dates from the beginning of the eighties (Biltereyst & Meers, 2000; Terán, 2000: 34 - 36). According to Havens (2005: 282), "the changing tides of telenovela exports, from Western and Eastern Europe to Asia and the United States, demonstrate how such internationally popular genres are influenced by a host of worldwide economic and cultural conditions".

In the eighties, Televisa produced a *telenovela* that was successful not only in Mexico, but in other countries as well: *Los ricos también lloran*. This story, was written by Cuban writer Inés Ródena, and adapted to Mexico by Carlos Romero. Its star actress was Verónica Castro and its first episode obtained a rating of 46. After a few months on the air, other television stations in Spain, France, Switzerland, the Soviet Union, and China bought it.

In 1983, Verónica Castro left Televisa and in 1984, she worked on *La felicidad no se compra*, filmed in Italy and co-produced by Brazil, Argentina, and the United States. According to Terán (2000: 34 - 36), Verónica Castro was named "Queen of the Soap Opera" by European magazines, thanks to her success in that Continent. In 1987, she

worked again with Televisa on *Rosa Salvaje*, also broadcast in Germany. One of the factors that would influence *telenovela* production during those years was the success of the American series *Dallas*, which began transmission at the beginning of the decade. Dallas was the model for stories such as *El maleficio* and *Cuna de lobos*. These, as well as *Los ricos también lloran* and *Rosa salvaje*, were successful abroad.

Cuna de lobos has been one of the greatest of Televisa's exports. It has been rebroadcast from Sweden to Australia, passing through Germany, Venezuela, China, Italy, Russia, New Zealand, Norway, and Lebanon. In those years, Televisa became a consultant to television industries in India, Kenya, and Russia, helping them in their own productions.

Table 1 lists some of the Latin American *telenovelas* exported to other countries in the last decades.

Table 1. Exported *telenovelas* (1980-2000)

Producing country	Title	Buying countries
Mexico	*La felicidad no se compra*	Italy, Brazil, Portugal, US, China
	Rosa salvaje	Germany
	Los ricos también lloran	Spain, France, Italy, Switzerland, USSR, China
	Cuna de lobos	Sweden, Australia, Germany, Venezuela, China, Italy, Russia, New Zealand, Norway, Lebanon
Venezuela	*Cristal, La Dama de Rosa, Rubí, Arrayán, Ambiciones*	Spain
Colombia	*Yo soy Betty, la fea*	Spain, US, Canada, Mexico, Bogotá, Venezuela, Chile, Peru

Source: Terán (2000), 34-37; 57

Table 2 gathers the cost of acquisition of Latin American *telenovelas* according to the different countries. Compared to the acquisition of US series in those same countries, data shows that the former is much cheaper than the latter. The differences from some countries to others have to do with the GDP of each country, population volume, per capita income, advertising investment, the degree of development of competition in the audiovisual sector and the interest to acquire these programs.

Table 2. Price of acquisition of Latin American *telenovelas* and US series ($ per episode) 1998

Buying country	Telenovelas	US Series
Spain	7,000-9,000	5,000-25,000
Germany	2,000-5,000	24,900-132,000
USA (Hispanic channels)	2,500-5,000	N.a.
Greece	500-700	3,000-5,000
Poland	300-800	1,300-3,000

Source: Mato (1999), 237; *Television Business International* (October 1998, 143-145)

The U.S. broadcasting market has experimented an explosion of new Latino-oriented television channels and the volume of *telenovela* exports may how exceed the volume of British exports (DCMS, 1999; Steemers, 2004: 43). According to Seiter and Wilson (2005: 140), "in the contemporary television market, there is an increasing competition with network soap operas, and *telenovelas* that acquire enormous audiences worldwide and are available through cable in most urban markets in the United States".

As well as Europe – Western and Eastern countries - and United States, Asian countries such as Indonesia, Philippines, Malaysia, Vietnam, Singapore, Thailand and Korea, have also acquired *telenovelas*. The biggest producers of *telenovelas*, Coral, Telefe, Promark and Comarex, estimate that 35% of their sales come from Asian in 2003 and they wait it grows up 50% (Havens, 2005: 281).

In order to achieve international audiences, the use of domestic political elements and on-location footage were removed "for more `universal´ domestic setting that foreign viewers supposedly identify with better" (Havens, 2005: 276). *Telenovelas* have become strategic products of these companies. In the nineties, compared to the advertising sales, the export sales of *telenovelas* involved 8% for Venevisión, 5% for Televisa and 2,5% for Globo (Mato, in García Canclini, 1999: 238).

Telenovelas represent the driving force of development of the international expansion of some Latin American groups (Michelín, 2003). More particularly, Spain becomes a strategic place for their international plans. Many *telenovelas* are first distributed in Spain (Table 3) and then in other European countries (Mato, in García Canclini, 1999:245). In this sense, it is worth mentioning the distribution of *telenovelas* of the Television Mexican group Televisa through its international satellite channel, *Galavisión*, launched in 1988.

Table 3. Telenovelas broadcast in Spain (April 2006)

Time	Channel	Telenovela – producing country
12:30	C9	*Gata salvaje* – Venezuela
12:30	TVC	*El amor no tiene precio* – México
13:15	IB3	*Brujas* – Chile
16:00	A3	*El cuerpo del deseo* – Colombia
16:00	TVE-1	*La tormenta* – Colombia
17:15	A3	*Rubí* – México
17:15	TVE-1	*Amar en tiempos revueltos* – Spain
17:20	TVC	*Como tú ninguna*- Venezuela
10:00	TVE-1	*Floricienta*- Argentina
12:10	TVE-1	*Los Plateados* – México

Source: http://www.tele-novela.wanadoo.es/

Many companies not only have exported *telenovelas*, but also have begun to exploit the formats and to produce series in other countries, mainly in the United States and Spain (Sinclair, 2000:79). They have managed to develop their own industry, with more than five hundred titles presented in international festivals (Rey, in Orozco, 2002:126). Some producers have even developed consulting services for foreign production crews.

In addition, some Latin American companies have signed agreements with Spanish firms to distribute them in Europe (Fuenzalida, 2000:303). Sony-Columbia signed an agreement with Spanish companies to produce films and television series, such as *Simuladores* (2006) or *Dí que sí* (2004). Telemundo has allied with the production company Promofilm, affiliated to Árbol group, to adapt its formats to the Hispanic market. Cisneros group oppened in 1996 an office in Madrid in order to spread its activities towards Europe, the Middle East and Southeast Asia.

An example of the success of *telenovelas* in Europe is Zona Visión, a company based in London, which launched *Romántica* in 1988, a thematic channel specialized in *telenovelas*. In the year 2000, the signal reached five million viewers of 26 countries, which included, among others, Poland, Russia, Croatia, Hungary, Bulgaria, Rumania and the Czech Republic. Most *telenovelas* are produced by Venevisión (Venezuela).

2. Growth of the Latino market

The other element to spread the latino globalization was the extension of a new market based on common cultural roots, mainly connected through the Spanish language. The extension of this market covers United States, Latin American countries and the rest of the world because of the presence of the Spanish speaking companies. First, we will see the international strategy of Televisa and then will see the dimension of this market.

2.1. The Hispanic market in the United States

During the sixties TSM began to enter other markets. The Azcárraga family began to participate with capital in foreign companies with television channels in the United States. The aim was to reach the Hispanic population with its content. This population was assuming a more active role in American society. It also offered advertisers a new alternative for broadcasting commercial messages.

In 1961 Emilio Azcárraga Vidaurreta established two companies in the United States: Spanish International Network Sales (SIN) and Spanish International Communication Corporation (SICC). Through SICC he was able to buy American television stations. This would later become Univision, the most important network devoted to the Spanish-speaking market in the United States. The first two stations were KMEX Canal 34 in Los Angeles and KWEX in San Antonio. Four years later, Azcárraga, together with other foreign investors obtained a license to build WXTV. Due to legal complications, broadcasting did not begin until three years later.

According to Mejía (1998: 39), during the second half of the sixties, Televisa established itself as the greatest Latin American exporter of content. In 1969, the firm exported 643 half-hours of programming to the United States and Latin American. One year later, it was sending programming to 33 channels in countries throughout America.

The absence of Spanish language programming for Hispanics in the United States helped the Azcárraga family develop and expand its distribution network in that country. According to Arredondo and Sánchez (1986: 134), this market had been neglected by the American networks, so that SIN became the fourth largest broadcaster after CBS, NBC and ABC.

Some years later, in 1994 Televisa co-produced with News Corporation the first bilingual *telenovela*, in English and Spanish. It was called *Imperio de cristal*. In 1995 the trend continued with *telenovela*s using the same stages, and with scripts translated from Spanish into English. Bilingual *telenovela*s from that year were *Acapulco Cuerpo y Alma* (Acapulco Bay), *La sombra del otro* (The shadow), and *Para toda la vida* (Forever). These productions were broadcast through Televisa stations located on the U.S. – Mexico border. They were, however, not successful.

The *telenovela Imperio de cristal* (The Crystal Empire) was the first production of Rupert Murdoch's Morning Glory Productions, broadcast in prime time in Mexico. Fernández and Paxman (2000: 434) state that its first chapters had excellent production values. Not only was it well acted, and with a rich selection of hateful characters, wealthy and deceitful, but also it included notable staging and lighting. However, due to problems of edition and organization, the English version was never shown in the United States.

The creation of this type of content would help Televisa reach new markets outside of its national borders, and receive income in foreign currency. Co-production with News Corporation helped reduce costs, and in some manner, facilitate distribution of *telenovela*s through diverse distribution windows.

Since 1990, the growth of the Hispanic population in the United States has risen to above 50%, mainly due to immigration and a high birth rate. Therefore, it is a young population, with an average of 29 years old. In 2000 there was practically the same Hispanic population in the United States as in Argentina (37 million). The following table shows the growth of the Hispanic population in the United States.

Table 4. Evolution of the population in the United States (1970-2000)

	1970	1980	1990	2000	Variation 1970-2000	Increase % 1970-2000
U. S. Population	203m	226m	249m	281m	78m	38%
Hispanic population	9.1m	14.5m	22.4m	35.3m	26m	286%
% Hispanic versus U.S.	4,5%	6,4%	9,8%	13,2%		

Source: U.S. Census. 2001.

As a result of this growth, there has been an important development of different media targeted to those population groups and promoted by U.S. companies in collaboration with Latin American companies. In U.S., the most important television channels are Univision, which belonged to Televisa; Venevisión, original from Venezuela, with an audience of 80%; Telemundo, created in 1987, which reaches 40% of the audience and was sold to NBC in 2001, and Azteca Television, which receives programming from TV Azteca and reaches around 60% of the Hispanic population thanks to its 24 affiliated stations. Since 2004 there are about nineteen new Latino-oriented channels and thirteen, in 2005 (Havens, 2005: 281). These channels not only are important because of the audience that they reach, but because of the advertising investment that they attract.

2.2. The Latino market in the world

The commercial relations between companies from the North and the South of America have got narrower during these years. Televisa formed an alliance with Discovery Channel in order to produce the Spanish and Portuguese version of the channel and to broadcast it in Latin America and the Iberian Peninsula. Telemundo looked for allies to distribute its *telenovelas*, such as Globo in Brazil, Argos in Mexico and Caracol in Colombia. This region has also become the second natural expansion market for U.S. companies.

Some media even consider developing their contents in Spanish. In this sense, an example was the creation in 1997 of CNN in Spanish for Latin America, or the creation of advertising campaigns whose target is the Hispanic audience, with products like Wendy´s, Wall Mart, Pepsico, Coca-Cola and AOL.

The Latin American presence in Europe has also been noticeable by means of direct investment in other companies (Havens, 2006: 52-57). For instance, in 1993, Televisa bought 25% of the capital of Unión Ibérica de Radio, owner of twenty-five local radio stations in Spain. In 1996, it acquired part of the capital of the recently created digital television Via Digital, from Telefónica group, and in 2006, it was the finance partner of the new open-air television channel, La Sexta.

The relationship between Spain and Latin America has been closed for many centuries. Language and culture have been two key factors for the development of these relations. In the media sector this relationship became closer especially after 1997 (Bonet & De Gregorio, 1999:80-81).

Before 1997 these relationships were mainly based on distribution agreements. The first company to establish alliances with Latin America was the public television channel TVE, which in the 1980s produced a show called *Trescientos Millones* that was produced and broadcast both in Spain and Latin America. Later, after privatization of the television market, the private channel Antena 3 TV made different agreements with the aim of broadcasting its contents via satellite in the American continent. Newspapers and magazines such as *El País, ABC* and *¡Hola!* were not only distributed within Latin America, local editions were also published in those countries.

After 1997, the process increased and new aspects appeared in the market field (Medina, 2001). The number of Spanish companies that made agreements with American companies rose. Not only for distributing their products in the new continent, but also for developing new business in emerging sectors in collaboration with leading groups in Latin American countries.

Some small companies had initiated relationships with certain Latin American companies by that time (Medina, 2004). For example, Recoletos spread its know-how and performance in specialized and financial news publications to Chile, Mexico and Argentina. Grupo Correo - today Vocento- developed a local press business in Argentina together with *Clarin* and *La Nación*. As the national production of fiction was carried out in Spain, the production companies considered distribution strategies for Latin America. For example, the Spanish producer Zeppelin formed an alliance with Gestmusic to distribute their programs. The series *Querido maestro* was sold to Argentina, Mexico and Venezuela and *Cuéntame cómo pasó* to Argentina, México and Puerto Rico.

In the same period, other major corporations such as Prisa and Telefonica implemented international strategies regarding Latin America. Prisa set up businesses in sectors such as daily press, radio, music and financial news in countries like Argentina, Colombia, Chile, Panamá, Costa Rica and Bolivia. Telefonica expanded with radio, television channels, cable, telephone, Internet and film and television production companies in association with leading local companies in Argentina, Peru, Brazil and Venezuela

Despite all the uncertainty, as well as the low profitability in the short term of some investments and the instability of many Latin American countries, some Spanish companies sold some of their investments.

However, Latin-American market is still very attractive for European companies and some of them are increasing their presence in that continent. For example, in 2006 Endemol bought 85% of shares of the Colombian company Endemol Andino; has signed an agreement with TV Globo; has named a new general manager for the area and has acquired some production studios in Argentina. Telefonica bought part of the pay television operator in Brazil.

The dimension of this market has grown in the last years thanks to the music sector and the Internet. The Hispanic use of Internet has grown as well as the interest of advertisers for this market. According to New York research firm eMarketer Inc., "online ad spending targeted at Hispanics is projected to increase 32% in 2006 to $132 million, compared with a 25 % increase to $15.6 billion for the overall U.S. Internet ad market" (Delaney and Barnes, 2006).

There is a recent demand for Latino products not only because the immigration from the Latin American countries towards United States and the rest of the world, but also because their cultural goods are well accepted by universal audiences. Lastly, we will reflect about the cultural aspects of this phenomenon and its relationship with the "made in U.S." contents distribution.

3. Hispanic Globalization: its borders and their reach

The growth of Hispanic media, in the United States as much as in the rest of the world, still has some borders to cross, which make doubt about their global dimension. Some authors consider that when the products are distributed outside their borders, they lose the native values in order to adapt to a little defined global culture. In particular, Veciana-Suárez (1990) indicates the influence of the United States in the news approach of Hispanic media and considers it as a threat for the diffusion of "the Hispanic" vision of events. Moreover, Havens (2005: 271) outlines that *telenovelas* are an example of local autonomy and global homogenization. What is true is that the expansion to other markets and the international distribution forces to adapt the products to local cultures (Barker, 2003; Waisbord, 2004; La Pastina & Straubhaar, 2005), since the market development depends on the acceptance of the audience.

On the other hand, this global market is such only for certain sectors as television fiction, cinema, music, and some news. Nevertheless, for other sectors such as publishing, the international strategies for books have greater barriers of entrance.

Language is a barrier to reach international markets. Contents need sometimes to be dubbed even in countries, which share the Spanish language, because the idiomatic uses are different. Although there are common roots, there are remarkable differences between the programs produced in Spain and Latin America. In general, the Spanish fiction production

has a remarkable influence of the United States, mainly in the reflection of the welfare state and the consumer society, although it maintains a "castizo" (pureblooded) tone and a particular picaresque, which makes it different. The rudeness of dialogs, the puns, the humoristic constructions and the personality of characters often force the tasks of adaptation to other cultures where the characters may usually have a softer tone. In addition, the Spanish contents are infused of the European rationality and drama and as Hoskins and Mirus (1988: 500) pointed out "differences relating to style, values, beliefs, institutions and behavioral patterns will limit the appeal of foreign programs". That is why some Spanish companies produce in Latin America because it is cheaper and it helps to avoid cultural malfunctions.

Moreover, the Hispanic world in the United States is also peculiar because of the particular connotations of immigration and the adaptation problems that it reflects. The film *Spanglish* is a good example of that.

In spite of these differences, it is possible to identify some "Latin" features that are different from the "dominant" culture of contents produced in the United States. On the one hand, there is a common language, which is Spanish, and a certain cultural proximity (Straubhaar, 1991; Sinclair, 2000:131; Sánchez & Hernández, 2000:14). According to Straubhaar (in Chan & McIntyre, 2002:195), it could be defined as a geocultural market united by language, history, religion and culture; with a common identity based on gestures and non-verbal communication.

Latin American *telenovelas* are characterized by being constructed on universal feelings and passions. "The pride to belong to a particular race" appears as a recurrent value. The difference between good and bad is neat. They usually have a certain social stress, mainly focused on the differences of social classes. The production of Latin American *telenovelas* is different from that of the American series. They follow a classic narrative scheme, with an exposition, complications and a resolution with a happy end, whereas the American series have open scripts that develop according to the success of the series. *Telenovelas* usually have a protagonist, whose story conditions the rest of the story and that of the characters. At the same time, family appears as a source of personal identity. American series present a multitude of characters with equal weight when it comes to lead the plot. The topics of *telenovelas* are classic: impossible love, rich and poor, hatred, revenge and always a "moral" at the end. American series have a more realistic tone: there are not so many social differences, nor such strong passions and humor is always present (Michelín, 2003).

Therefore, it is possible to distinguish the international distribution of a culture with different characteristics from that produced in the United States (Schlesinger & Morris, 1997:64). Globalization in this sense could be identified with the presence of the same contents with a common language in Europe, America, the United States and Asia. Although perhaps the dimensions of the first steps of cultural globalization were bigger, we are witnessing a phenomenon of great dimensions that is growing and spreading all around the world (Fuenzalida, 2000: 309). The increasing importance of the Hispanic channels and the distribution of *telenovelas* allows us to speak of a global phenomenon, since television is the media par excellence when it comes to favor internationalization (Elasmar, 2002:182).

Ben Amor Mathleu (2000: 74) uses the expression "global TV" to designate the channel which targets a population with a culture and some necessities in common. Furthermore, it is possible to distinguish a media market targeted toward a Latino audience and with high attractiveness for the advertisers.

Instead of eliminating the "one-way street", this new Hispanic globalization might complement it (Mastrini & Becerra, in Quirós & Sierra, 2001: 188; Slade & Beckenham, 2005). So there are a series of smaller roads that "reverse media imperialism" (Rogers & Antola, 1985), built through some key strategies related to production, marketing, distribution and audience satisfaction. As Havens (2006: 7) outlines "the story of a global television is not simply one of domination by the powerful; it also includes a good deal of resistance by television professionals who use the global programming markets to produce, purchase and schedule television programme differently".

Therefore, as Gershon (2000) indicated, if globalization favors the relations between the different cultures, the development of the industry of communication will favor the understanding between the different nations.

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Diffusion of Spanish Language in Hispanic Chambers of Commerce Home-pages

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Abstract

Diffusion of information and innovations follow a pattern of adoption that can be traced directly to change agents, opinion leaders, and is facilitated by mass media and interpersonal communications. This study focuses on Hispanic Chambers of Commerce and their adoption of the Spanish language on their Home-pages. Specifically, searching for the percentage of content currently available on Hispanic Chambers of Commerce Home-pages that are in Spanish and testing whether the Hispanic Chambers of Commerce Home-pages that are using the Spanish language will have members and consumers that are considered opinion leaders and innovators. A content analysis of 33 Hispanic Chambers of Commerce Home-pages in Texas was conducted and those sites using the Spanish language were further analyzed to see if advertisers/sponsors could be considered innovators using Rogers (1995) diffusion of innovation theory. Preliminary results support the claim, however it is suggested a nationwide search of estimated 600 Hispanic Chambers of Commerce Home-pages would solidify the claim.

Diffusion of Spanish Language in Hispanic Chambers of Commerce Home-pages

Introduction

Spanish was the language used to classify people as Hispanics in the 1980 census. According to the Pew Hispanic Center (2006), "population estimates and projections, the Hispanic population increased from 8.5 million in 1966-67 to 44.7 million today." The US Census Bureau classifies individuals as Hispanic if they have a Spanish surname (an origin of Spanish descent) even if they were born in the US and do not speak Spanish. Why would it matter if a person of Spanish origin (Hispanic) could speak Spanish or not? For business purposes, in the United States, English is the preferred language and the result of counting people, is to better allocate government revenues. Interestingly, these revenues are increasingly coming from Hispanic-owned businesses. The US Census Bureau (1996) reports the number of firms owned by Hispanics increased from 489,973 to 862,605 a 76% growth over a 5-year period between 1987 and 1992. And receipts for Hispanic-owned firms increased 134%, twice the rate of all firms during the same period — from $32.8 billion to $76.8 billion. This trend along with the fact that in 1990 about 14% of the US population 5 years old and over spoke a language other than English at home, that Spanish was spoken by about one-half of all non-English speakers in the US, and nearly all non-English speaking Hispanics speak Spanish (US Census Bureau, 1996), is the driving force behind this research proposal.

The main issue for consideration is the diffusion of the Spanish language in Hispanic Chambers of Commerce Web-pages. Specifically, this research intends to apply Rogers (1995) diffusion of innovations (DOI) theory to the Spanish language and its use in Hispanic Chambers of Commerce Web-pages. The first thing to do is justify why the Spanish language should be considered at all, in any mass communications message, especially in a business setting like an Hispanic Chamber of Commerce Web-page, designed to promote local business. Here is a chance to reflect on the Hispanic population as a whole, they are the fastest growing population in the US. It is estimated that by 2008 the spending power for US Hispanics will be over a trillion dollars (Korzenny & Korzenny, 2005, p. 19). If the US Hispanic market were imagined as another Latin American country, they would be the fifth largest and the richest (Davila, 2001, p.65). With the stakes so high, Hispanic Chambers of Commerce can borrow a page from the Spanish television networks corporate clients' marketing plans for reaching the maximum number of potential consumers. These corporations almost always limit their Hispanic marketing efforts exclusively to Spanish-speaking consumers. The Spanish language plays a symbolic role in corroborating the Hispanic identity and being the preferred language for all Hispanics, even if they do not speak it (Davila, 2001, p.71). The most logical path appears to be for Hispanic Chambers of Commerce to adopt a bilingual Web-page for their consumers. It is hoped a content analysis of Hispanic Chambers of Commerce Web-pages will flesh this out.

Literature Review

One might think Hispanic Chambers of Commerce Web-pages have only been around as long as the Internet itself and they would be right, but the ideas and services these organizations deliver have been around for quite some time. The San Antonio Hispanic Chamber of Commerce (SAHCC) states it is the oldest organization of its type in the United States, having been originally chartered as the Mexican Chamber of Commerce in 1929. Today, there are about 35 Hispanic chambers of commerce in Texas and about 600 across the nation. Hispanic minorities face discrimination in business, just as in employment, education, voting, infrastructure, access to capital and markets. These social issues necessitated that the SAHCC go beyond the traditional scope for chambers of commerce and into one of dual social and business advocacy. The SAHCC played a central role in the promotion, negotiation, lobbying and passage of the North American Free Trade Agreement (NAFTA). Interestingly while SAHCC offers the usual opportunities for networking at mixers and seminars its Web-page is English only (SAHCC, 2007).

Assessing the state of Spanish language in Hispanic Chambers of Commerce Web-pages appears to be an exercise inside the crucible of Zangwill's 1909 play, *The Melting Pot*. Hispanic people are metaphorically poured in a great "melting pot" in order to melt away the differences. The Spanish language is one of the differences the Hispanic people share as their own and ought to be celebrated and not melted away. Tiedt & Tiedt, (2002) metaphorically describe this celebration as the "tossed salad" idea (p.6). Take for instance the United States Hispanic Chamber of Commerce (USHCC) Web-page, it has many useful features, as long as the consumer reads English. The USHCC (2007) Web-page states that Mexico alone receives over $15 billion a year in remittance from the United States. These remittance dollars make up Mexico's largest industry. Is there a possibility that these numbers would increase if the USHCC and other Hispanic Chambers of Commerce adopted a Spanish language Web-pages? The Regional Hispanic Chamber of Commerce (2007) in Long Beach, California has links in Spanish, but they simply connect to the same English pages. How will Spanish-dominant Hispanic entrepreneurs be able to take advantage of the services provided, like breakfast at the Queen Mary if they do not read English? This fact is interesting because California has the largest Hispanic population in the nation, 12,268,000 where 1out of every 3 persons in California is Hispanic (Latin Business Owners of America, 2006).

The benefits of having a bilingual Web-page are obvious once access is available. Azteca America (2007) a Hispanic broadcast station uses a bi-lingual Spanish/English link on their home page. It lists market trends, demographics, promotions, adverting, news, and contact information. This is the type of information Spanish-dominant Hispanic consumers can use. Today there are two Mexican retailers, *Grupo Gigante* and *FAMSA*, following their customers into the United States. *Supermecado Gigante* now has eight stores around Los Angeles and hopes to have 20 U.S. stores by the end of 2008. Meanwhile, home-goods retailer *FAMSA* opened a second store in the Dallas area in 2004 in addition to their nine stores in Southern California. One appeal of *FAMSA* on the U.S. side of the border is that merchandise can be bought in the United States and picked up in Mexico. The company estimates that one-fifth of sales at its California stores are for delivery in Mexico. The company is now eying expansion in the Chicago-land area. How

long will it be before Dallas based *Pizza Pátron* opens stores in Mexico allowing Mexican consumers in Lubbock, Texas to send their family a fresh, hot out of the oven, chorizo pizza for dinner, bought with Mexican pesos? The Central California Hispanic Chamber of Commerce (2007) is producing a bilingual travel guide designed to bring awareness to Central California as a destination point in order to increase jobs and revenue in the area. Their home page has a mariachi playing a trumpet as a greeting, a nice touch despite not having any Spanish language links. The Spanish language is a robust language that can be used in Hispanic Chambers of Commerce to bring Spanish-dominant Hispanic business owners together with English-dominant Hispanic business owners and consumers in order to promote each others businesses. But with so little interest of the Spanish language on Hispanic Chambers of Commerce Web-pages at this time, the question crying out from the U.S. urban jungle is: When will Hispanic Chambers of Commerce in the U.S. start to adopt the Spanish language on their Web-sites and welcome Spanish-dominant business owners?

Theory

Mass communications is a social process that has grown from the town crier to newspapers, magazines, books, billboards, radio, television, movies and now includes the Internet, mobile phones, and some may argue, flying passenger planes into high-rise buildings. Mass communications theories help explain and predict the relationship between two or more variables. In the Hispanic Chambers of Commerce Web-page case, the independent variable is the web-page itself and the dependent variable is the use of Spanish language. Hispanic Chambers of Commerce reasons for not using the Spanish language on their Web-pages vary from economic, pride, self esteem, professional reputation, and plain ignorance. It could also be difficult to measure the effects of Spanish language Hispanic Chamber of Commerce Web-pages. Because of this reason, it makes sense to use Rogers (1995) diffusion of innovation theory as a framework to see where in the adoption state Spanish language lies for Hispanic Chambers of Commerce Web-pages. This is important because as Denning & Dunham (2006) insist, "Innovation is a normal human process—almost everyone is looking for better ways to do everyday things" (p.49). With this reasoning, theoretically it makes sense for Hispanic Chambers of Commerce to use the Spanish language in their Web-pages.

Diffusion of innovations has garnered a great deal of interest for researchers in the past sixty years, about 5000 published studies since 2004 (Haider & Kreps, 2004). Diffusion is the process diffusing, dispersing, and disseminating, it comes from the Latin word *diffusus* which means to pour out or spread (Morris, 1979). Probably the best way to think of DOI is how Greenhalgh, Robert, Bate, Macfarlane & Kyriakidou (2005) describe it, "As with the chemical process from which the metaphor is taken, diffusion of ideas or practices is an essentially passive process whose key mechanism is imitation" (p.29). DOI is a latent readiness simply waiting to be triggered. The trigger for this latent readiness is created by an awareness, of either an interpersonal or more often, a mass communications message. Once awareness is established, elaboration thoughts for the idea or innovation will occur. Without awareness there can be no interest, without interest there can be no elaboration and the idea or innovation will not be adopted. What keeps interest alive? Value, when people perceive the value of an idea or innovation, they will be more likely to consider it. So using DOI as a descriptive tool for understanding how human behaviors change and how it can explain the adoption of information of Spanish

language media, researchers should keep in mind what Minishi-Majanja & Kiplang'at, (2005) contend, DOI will not be a basis for predicting outcomes or guidance on how to accelerate the rate of adoption.

As mentioned above Diffusion of innovations is a social process. It is an extension of Paul Lazarsfeld's two-step flow theory. This is the idea that messages pass from the media gatekeepers, opinion leaders or change agents who influence the process by imposing their power and expertise to opinion followers (Baran & Davis, 2006). Baran & Davis (2006) discuss how DOI application had its drawbacks, "during the Cold War of the 1950's and 1960's, when the U.S.A. competed against the USSR for influence in the developing nations (p. 174). Farmers adopted complex new machinery only to have it break down and stand idle after change agents left" (p.175). DOI can however help in certain situations where health issues are concerned, like boiling water before drinking, washing hands before cooking, and using condoms to prevent STDs. In matters concerning public health issues Haider & Kreps (2004) insist, "The DOI model rests on the idea that one should try to accelerate the filtering of innovations from the innovators to the laggards as quickly and precisely as possible (p.5). Ideas like germs are contagious, they create powerful images that influence and affect consumer's adoption of ideas. Once a person is exposed to a message, they cannot claim to be unaffected, it is like being sneezed on by someone with a cold, who can decide if they are to catch a cold or not? A better question would be not whether or not they catch a cold, but when will they catch a cold?

French sociologist Gabriel Tarde helped explain the DOI concept in 1903 with the introduction of the S-curve of diffusion (Salwen & Stacks, 1996), but it was the communications scholar Everett Rogers who reviewed thousands of studies in a meta-analysis of information (innovation) diffusion theory that has since laid the groundwork for DOI studies. Rogers' (1995) explanation of the S-curve of adoption has five categories: innovators, early adopters, early majority, late majority, and laggards. Rogers describes how the innovation process starts with some agenda setting by the media, or the elite who decide what information or innovation needs to be diffused as a way to cope with problems. These people are usually well educated leaders, policy makers and gatekeepers able to cope with a high degree of uncertainty. On the continuum of the adoption process theses people are known as **innovators,** they are predisposed to taking risks and being pioneers of new ideas and innovations. **Early adopters** described by Minishi-Majanja & Kiplang'at ((2005) are individuals who maintain a central position in communications networks and would always make judicious and innovative decisions. They are usually outgoing, respected by their peers, and are the embodiment of success in discrete use of new ideas. Those in the **early majority** category are likely to adopt an innovation just before the average person. As Haider & Kreps (2004) put it, they are "likely to deliberate before adopting a new innovation," (p.5) and they constitute one-third of the members of a system (population). The **late majority** category takes up the other one-third of the system and is generally skeptical, cautious to adopt an idea or innovation until the majority has done so. Peer-pressure may be required due to some social and/or economic status or lack of skills (Minishi-Majanja & Kiplang'at, 2005). The final category of adopters is the **laggard**. They may have limited resources, tend to be the least educated and usually take a wait and see attitude, because they are suspicious of new innovations. They resist adoption as long as possible.

Some innovations can simply be like the 1943 hybrid seed corn introduced to Iowa farmers for the purpose of increasing corn yields by 20 percent per acre. The problem in Iowa was the farmers took 12 years to adopt the hybrid seed corn despite the obvious advantages. Why would it take so long for these Iowa farmers to come around? Is there a parallel between Hispanic Chambers of Commerce adopting the Spanish language on their Web-pages and Iowa farmers adopting hybrid corn seed? The Spanish language is not a new innovation; it could possibly increase Spanish-dominate visitors to Hispanic Chambers of Commerce Web-pages. Surprisingly, Callow & McDonald (2005) found, "over one-half of the web-sites advertised in Spanish language advertisements failed to provide the choice of Spanish language web-sites" (p.293). The important question now is: Will the Spanish language prove to be the proverbial fly in the ointment of Hispanic Chambers of Commerce Web-pages? These thoughts help point the need for a descriptive answer to the research question:

RQ1: What percentage of content currently available on Hispanic Chambers of Commerce Home-pages is in the Spanish language?

Operating from the assumption that consumers of Hispanic Chambers of Commerce Web-pages tend to identify strongly with the Hispanic heritage including the Spanish language and are likely to be business owners themselves, or interested in going into business, leads to the proposed hypothesis:

H1: Hispanic Chambers of Commerce Home-pages using the Spanish language will have members and consumers that are considered opinion leaders and innovators.

Methodology

A content analysis of the estimated 600 US Hispanic Chambers of Commerce Web-pages (SAHCC, 2007) is proposed. This will be preceded by a pilot test of the estimated 35 Texas Hispanic Chambers of Commerce Web-pages (SAHCC, 2007). Given the descriptive nature of the research question, ratio data will be tested to determine the percentage of Spanish language words on Hispanic Chambers of Commerce Web-pages. Coding for the Web-pages will be done using Scott's *pi*, with an intercoder reliability set at .80. Starting at a Web-sites home page, coders will be able to count how many words are in Spanish. If there is a Spanish word that has a link, it will be opened to ensure that indeed the link is to a Spanish language page. If the Spanish word link is in English the Web-page will not be coded as bilingual. Once a Hispanic Chamber of Commerce Web-page is found to indeed be bilingual, the hypothesis can be tested.

In order to find out if the consumers or members using these bilingual web-pages are innovators and opinion leaders it will be necessary to determine who is advertising on the web-page. The underlying assumption is that individual business owners and company's spending money on advertising in these web-pages are more likely to be considered innovators and opinion leaders. A composite list of advertisers on a Spanish language, Hispanic Chamber Web-page will be compared with local normative guidelines for innovators and opinion leaders. In other words these advertisers should have their own web-page describing any innovations and activity they are involved in. The operational definition for being an innovator or opinion leader will be measured by the company's web-page and self-report of community activity as an industry leader:

- Those with no web-site will be classified as **laggards**
- Web-site but no activity **late majority**
- Web-site with one recognition in either community or industry **early majority**
- Web-site with two recognitions in either community or industry **early adopters**
- Web-site with three or more recognitions in either community or industry **innovators**

The statistical analysis employed to test the hypothesis will be a Pearson's chi-square. This test will compare the means of the dependent variable which is the web-page being English-only or bilingual, a nominal level measure with the independent variable of being an opinion leader and innovator, also nominal level data. It is hoped the results of this research will support DOI as theory and provide useful information for Hispanic Chambers of Commerce Web-page masters.

Preliminary Results

Of the estimated 35 Hispanic Chambers of Commerce's in Texas (SAHCC, 2007) a list of 33 were located. From this list (Appendix A) five did not have Web-sites and only two had Spanish language on their Web-site. Of these two, the Port Author Hispanic Chamber of Commerce was completely bilingual with 73 Spanish language words and 100 English words. The difference in number of words can be due to the lack of words needed in Spanish to say the same thing in English. The problem with the Port Author site is that it was not Online at this time. All that was up was the Home-page with no live links. The second Web-site Cámara de Empresarios Latinos de Houston was completely in Spanish. This is interesting because there is also a Houston Hispanic Chamber of Commerce that is totally in English and it does not have the same sponsors/advertisers. The Houston Hispanic Chamber of Commerce has the Texas Association Mexican-American Chambers of Commerce as the only sponsor/advertiser link, while the Cámara de Empresarios Latinos de Houston has 11 highly recognizable sponsors/advertisers.

Starting from the top of Cámara de Empresarios Latinos de Houston Web-page there are Bill Heard Chevrolet the self reported #1 Chevy retailer in the world, Aetna health insurance, Chase financial services, Comerica a multi-state financial services provider, Continental Airlines, Exxon Mobil, Houston Chronicle, Perry Homes, United Health Care, Wal Mart, and Univision. All of these sponsors/advertisers can be considered innovators and opinion leaders with three or more recognitions in either community or industry thus supporting H1. The answer to RQ1 for Texas, the percentage of Spanish language on Hispanic Chambers of Commerce Web pages is about 6%.

Discussion

From the results of the pilot test in Texas, it appears the diffusion of Spanish language in Hispanic Chambers of Commerce Web-pages has not yet reached the critical mass. For the one Web-site employing the Spanish language it is clear opinion leaders and change agents are supporting the adoption. If the pattern for Hispanic Chambers of Commerce in Texas is comparable to the rest of the country, diffusion of the Spanish language on these Web-sites will occur when opinion leaders/advertisers insist that bilingual Spanish-English Web-sites are the most valuable ones. A 2006 Simmons study showed:

- Internet advertising has a greater impact on online Hispanics than on non-Hispanics online.
- Spanish language is essential to connecting with Hispanic consumers online.
- Results are true for all Hispanics online, including those English-dominant.
- Online Hispanics have a higher level of engagement with Spanish-language websites.
- Nine out of 10 online Hispanics value Spanish-language websites as an educational and cultural resource for the Hispanic community.
- Three out of four feel an emotional connection to Spanish-language websites.
- 89 percent say they visit these websites to stay informed on current trends in Hispanic entertainment.
- Online Hispanics are more likely than non-Hispanics to find Internet advertising effective.
- Two-thirds of online Hispanics say they are more likely to click on ads on Spanish-language websites than on English-language websites.
- More than 60 percent of online Hispanics say that they find ads on Spanish-language websites more informative and educational than ads on English-language websites (Wireless News, 2006).

With researcher's evidence mounting, it is hoped Hispanic Chambers of Commerce will soon adopt Spanish language in their Web-pages.

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Appendix A

Texas Hispanic Chambers of Commerce Home-pages March 30, 2007

1. Abilene   Hispanic   Entrepreneurs
   http://www.hispanicabilene.com/entrepreneurs.htm
2. Amarillo http://www.cacha.org/default.htm
3. Arlington Hispanic Chamber of Commerce http://www.hispanic-chamber.org/
4. Austin   Hispanic   Chamber   of   Commerce
   http://www.hispanictips.com/2006/02/17/the-greater-austin-hispanic-chamber-of-
   commerce-tapped-linda-escamilla-as-interim-president-texas/
5. Bee County Area Hispanic Chamber of Commerce
6. Caldwell County http://www.lockharthispanicchamber.org/index.html
7. Cámara   de   Empresarios   Latinos   de   Houston,   Texas
   http://www.empresarioslatinos.org/
8. Cen-Tex   Hispanic   Chamber   of   Commerce
   http://www.wacohispanicchamber.com/
9. Collin County Hispanic Chamber of Commerce http://www.cchchamber.org/
10. Corpus   Christi   Hispanic   Chamber   of   Commerce
    http://www.cchispanicchamber.org/frameset.asp?aid=143
11. Dallas Hispanic Chamber of Commerce http://www.gdhcc.com/index.html#
12. Del Rio Hispanic Chamber of Commerce
13. Denton Hispanic Chamber of Commerce http://www.dentonhcoc.org/
14. Eagle Pass Hispanic Chamber of Commerce
15. El Paso Hispanic Chamber of Commerce http://www.ephcc.org/
16. FORT   WORTH   HISPANIC   CHAMBER   OF   COMMERCE
    http://www.fwhcc.org/frameset.asp?aid=158
17. Grand Prairie Hispanic Chamber of Commerce
18. Harlingen Hispanic Chamber of Commerce http://www.harlingenchamber.com/
19. Hispanic   Chamber   of   Commerce   of   Greater   Baytown
    http://www.baytownhcc.com/
20. Houston http://www.houstonhispanicchamber.com/hhcc/Default_EN.asp
21. Irving Hispanic Chamber of Commerce
22. Kleberg County Hispanic Chamber of Commerce
23. Lubbock   Hispanic   Chamber   of   Commerce
    http://www.lubbockhispanic.org/picts/careers.jpg
24. McAllen   Hispanic   Chamber   of   Commerce
    http://www.mhcc.net/images/placeholder.jpg
25. Midland Hispanic Chamber of Commerce http://midlandhcc.com/
26. Montgomery County Hispanic Chamber of Commerce http://www.mchcoc.org/
27. Odessa Hispanic Chamber of Commerce http://www.odessahcc.org/
28. Odessa Mexican American Network of Odessa http://www.odessahcc.org/
29. Port Arthur Hispanic Chamber of Commerce http://www.gthcc.org/
30. San Antonio Hispanic Chamber of Commerce http://www.sahcc.org/
31. San Marcos Hispanic Chamber Of Commerce http://www.sanmarcoshcc.com/
32. Seguin   Guadalupe   County   Hispanic   Chamber   of   Commerce
    http://www.seguinhispanicchamber.com/

33. Texas   Association   Mexican-American   Chambers   of   Commerce
    http://www.tamacc.org/

Cultural Adaptation of Hispanics

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Abstract

This research sought to comprehend the relationship between the Hispanic university students' acculturation levels and their Internet usage. In order to accomplish this purpose, the acculturation levels, Internet dependencies, and Internet connectedness patterns of the U.S.-born Hispanic and non-U.S. born Hispanic students from the University of Oklahoma were studied through an online survey. The acculturation, media system dependency and Internet connectedness concepts constituted the theoretical basis that guided this research. The main findings suggest that the Internet is a tool for acculturation and that the types of goals that the students seek to fulfill through the use of this new media are indicated by their orientation and understanding dependencies. Play dependencies are not significant for the students' acculturation. The main practical implication of the study resides on the fact that U.S. Hispanic students are heavy Internet users whose acculturation needs and wants can be addressed through tailored WebPages that satisfy their social understanding and action (self) orientation dependencies.

Cultural Adaptation of Hispanics in a Digital Era

Introduction

From the analysis of the 2000 United States Census data, one of the most important news was that the once relatively small Hispanic segment of the American public has become the largest minority group (Valdés, 2000). Moreover, the buying power of the Hispanic population has increased faster in the U.S. than that of any other minority group (Gibson, 2001). Therefore, corporate America has started to realize the importance of researching and understanding the Hispanic market segment in order to satisfy these people's needs and wants.

In this way, it is important to understand that the U.S. Hispanics are a heterogenic group of people from different countries and with different racial, demographic, socio-economic and cultural characteristics. Also, they have experienced different cultural adaptation processes depending on their English proficiency level, their type of contact or their family contact with the mainstream culture and their degree of acceptance or rejection of this new culture (Cuéllar, Arnold & Maldonado, 1995; Peñaloza, 1995). Therefore, segmentation processes are necessary in order to better understand and address the U.S. Hispanic's needs and wants.

An effective approach to segment the Hispanic population is to understand the different acculturation levels of the people that comprise this minority. Several factors have to be analyzed in order to know the cultural adaptation level of an individual or a group (Peñaloza, 1995). One of these factors is the English media usage. This is especially important in an era in which most content of the new media, such as the Internet, is in English and the constant access to immediate information determines the possibilities of immersing oneself in the U.S. culture, including its information, entertainment and commercial worlds.

Scholarly research, which will be further explained, has been done to specifically understand the Internet access and usage of the U.S. Hispanic population. However, an extensive literature review showed that most of the scholarly studies are focused on the Hispanic segments that lack the socio-economic means to have frequent access to computers and to the Internet. Therefore, a gap was found on the extant literature on the understanding of the Internet usage of the segment of the Hispanic population that is most likely to have the socio-economic conditions to afford Internet access.

In order to help to close this research gap, the present paper reports a study of how a fast-growing and important segment of the U.S. Hispanic population – aspiring professionals who are currently in college – use the Internet as a mechanism for acculturation. The research studies the types of Internet media dependencies that Hispanic students develop and the difference in the Internet usage and acculturation levels between U.S.-born and non-U.S. born university students. The significance of this research resides in the extension of the existing knowledge of: 1) the acculturation levels of an under-studied segment of the largest minority in the U.S., and for the 2) exploration of the relationship among the acculturation levels of these Hispanics, their Internet dependency goals and their Internet usage patterns. Additionally, this information will be useful for the communication agencies that want to understand how Hispanic students should be addressed through online content, and it will contribute with the improvement of a current Oklahoma Hispanic Webpage.

Theoretical Framework and Core Literature:

Several concepts will be reviewed as the theoretical basis for this study and they will be specifically applied to the U.S. Hispanic population. These concepts are: acculturation, media system dependency theory, and Internet connectedness. Also, a review of the extant literature of the U.S. Hispanics' access and usage of the computer and the Internet will be presented to understand the current multidimensional trends that influence their Internet connectedness.

Acculturation

"Culture is the sets of designs for living that human groups pass on from generation to generation" (Korzenny & Korzenny, 2005, p. 131). Korzenny and Korzenny explained that there are two types of cultures: objective and subjective. The objective culture is the perceptible social behaviors, but the subjective culture is an almost imperceptible background that leaves an indelible pattern in the cognitive framework of the individuals. When immigrants arrive to a new country, they can perceive the objective culture, but the understanding of the subjective culture is a complex process that involves time and results in different types of adaptation.

In this way, it is relevant to understand the degree to which the immigrants can adapt to a new culture. Numerous scholars have called this process of cultural adoption 'acculturation'. Gans (1997) affirmed that acculturation refers to the newcomers' adoption of behaviors, patterns, values, rules, symbols and so on, of the dominant cultural groups. Gomez (2005) considered that it is a process that leads to a melding of the individual's own cultural identity with the mainstream customs, and Faura (2004) explains that it is "a fluid process in which an individual picks up certain traits from a new culture, but maintains others from his native culture" (p. 30).

Through the years, acculturation has been understood as an unidimensional, bidimensional, and multidimensional process (Cabassa, 2003). Currently, the bidimensional and multidimensional models are the most used for acculturation research. The unidimensional acculturation process can be conceptualized as "movements along a single continuum, ranging from the immersion in one's culture of origin to the immersion in the dominant or host culture" (p. 132). This process is considered to affect only the acculturating group and not the dominant culture. Cabassa affirmed that an example of an unidimensional acculturation scale is the original Acculturation Rating Scale for Mexican Americans (ARSMA) (Cuéllar et al., 1980).

Additionally, Cabassa (2003) explained that the bidimensional model wishes to clarify how an individual can evolve from being strongly attached to his or her own culture to completely neglect or oppose his or her native culture. At the same time, this model intends to capture the involvement and valorization that an individual has of the host culture. Therefore, acculturation is measured with the bidimensional model through the degree of *assimilation* and *integration* of the individual. This model allows the individual to be simultaneously influenced by his or her native culture and by the new culture. Cuellar et al. (1995) explains that *assimilation* is "a mode of acculturation in which the acculturating individual loses his or her original cultural identity as she or he acquires a new identity in a second culture" (p. 279). Faura (2006) affirmed that assimilation is a linear process that "continues from generation to generation until the pre-existing culture is all but completely gone" (p. 37). *Integration,* on the other hand, is "a mode of acculturation in which the acculturating individual develops bicultural orientation and successfully integrates cultural aspects of both groups and feels a certain sense of identification and control with both groups" (Cuellar et al., p. 279).

Cabassa (2003) explained that two examples of promising bidimensional scales have been developed for the U.S. Hispanic population: the Bidimensional Acculturation Scale for

Hispanics (BAS) (Marín & Gamba, 1996) and the Acculturation Rating Scale for Mexican Americans-II (ARSMA-II) (Cuéllar et al., 1995). "Both scales correct the zero-sum assumption inherent in unidimensional acculturation scales by producing independent measures for the maintenance of the culture of origin and the adherence to the dominant culture" (Cabassa, 2003, p. 136). The ARSMA-II has the particularity that it can function as a bidimensional or multidimensional scale. Both scales will be further explained in the methods section. Last, a multidimensional acculturation model can be employed to measure the integration and assimilation strategies plus the separation and marginalization ones, through an orthogonal approach from which bicultural typologies can be derived.

Hispanics' Acculturation Process

Valdés (2002) affirmed that there is a significant segment of the U.S. Hispanic population that is not U.S.-born. "In 2000, 39 percent (or 12.8 million) of the Hispanic population in the United States was foreign born. Of this group 43 percent entered the United States in 1990s. Nearly 30 percent came in the 1980s, and the remainder (27 percent) entered before 1980" (p. 33). These Hispanic generations have been experiencing cultural adaptation processes, which has been the focus of scholarly research through the past two decades.

Forrest (2005) explained that the Hispanic acculturation process is characterized by three stages through which Hispanic immigrants have to pass: the observation of the U.S. mainstream culture, the reacting to this culture and the final adjustment stage. Moreover, Hispanics can experience two main types of acculturation processes: an active one, where they make conscious efforts to become more similar to the U.S. mainstream culture, and a passive one, where the social context or the environment of a person contributes to the acculturation process. In this second alternative, the immigrant's acculturation not only depends on the family, but also on the social networks to which he or she is linked. This passive process is emphasized by the collectivist characteristic of the Hispanic culture (De Mooij, 2004).

Peñaloza (1995) affirmed that some of the main factors that have played a difference in the Hispanic immigrant's acculturation process are age, education level, English proficiency, and experience in the U.S. market; "those who are younger, better educated, bilingual, and more experienced in the market had an advantage in the marketplace over those who are older, monolingual Spanish speakers, less educated, and less experienced in the marketplace" (p. 88). Moreover, Romero (2004) analyzed Hispanic acculturation studies on the 2000, and concluded that most Hispanics' acculturation processes are characterized by the *integration* approach, since they simultaneously incorporate aspects of their own culture and maintain a positive relationship with the members of the mainstream. "This process is facilitated by English language usage, media adoption, contact with English speaking friends and other social contact" (p. 65).

An additional factor of great importance in the U.S. Hispanics acculturation process is media use. In the past 25 years, two theories have emerged that have guided most research on the individuals' use of the media: The media system dependency theory (DeFleur and Ball-Rokeach, 1989) and the uses and gratifications theory (Leung and Wei, 2000; Ruggiero, 2000). Both theories explore media usage, identifying variables that explain how and why people use media. Media system dependency theory was chosen as part of the conceptual bases of this study, since it provides a tested framework of measures that allow researchers to better understand how audiences rely on certain media for specific tasks and goals. Additionally, this theory can be better integrated with other notions in this study derived from the Internet connectedness concept, which will be further explained.

Media System Dependency Theory

DeFleur and Ball-Rokeach (1989) affirmed that in the media system dependency theory "the media system is assumed to be an important part of the social fabric of modern society, and it is seen to have relationships with the individuals, groups, organizations, and other systems" (p. 303). In this way, the authors clarified that in this theory, society is viewed as an organic structure where the micro and macro social systems are related. Skumanich and Kintsfather (1998) explained that the individual's relationship with the media system can be studied through the individual media system dependency model, which "provides a concrete base for the empirical measurement of definitive causal dependency relationships of an individual with respect to a specific medium" (p. 200). Therefore, different media effects, which might rely on the individual's demographic or psychographic variables, can be predicted more accurately. In this way, Skumanich and Kintsfather (1998) explained that since the importance of the media for the individual resides on the satisfaction of fundamental human goals, the individual media dependency model provides a comprehensive conceptualization of these goals through a typology of the individual media system dependency relations. Therefore, three exhaustive but not mutually exclusive concepts that explain media dependencies have been defined: understanding, orientation and play.

> Understanding focuses on the need for individuals to have a basic understanding of themselves and to make sense of the world around them. Orientation refers to an individual's need of a guide for behavior to direct personal actions effectively and interact successfully with others. Additionally, play or recreation is an important avenue through which one learns societal roles, norms, and values and is reflected in such activities as sport, dance, and celebration. Play also provides valuable coping mechanism such as tension release and escape. (p. 203)

Each of these categories is divided in two sub-categories characterized by a self and social focus that reflect the type of media dependency experienced by the individual. In this way, DeFleur and Ball-Rokeach (1989) explained that *understanding* is divided into self-understanding and social understanding, *orientation* is divided into action orientation and interaction orientation, and *play* is divided into solitary play and social play.

Internet Connectedness

The development of new telecommunication technologies, especially the Internet, have brought people more media choices through which they can satisfy in new ways their personal and social goals. Therefore, it is important to research the Internet consumption behavior of the individuals from different social groups, as the Hispanics population, in order to understand not only their Internet dependency goals, but also their Internet usage patterns, such as their usage frequency, places of connection and usage purposes. Based on this, the Internet connectedness concept is employed in this study to understand the relationship between the Internet and the U.S. Hispanics' usage of this new technology.

Internet usage has been identified by Jung, Qiu and Kim (2001) as a process through which scholars can study "connectedness" between new media technologies and different social groups. Jung et al. explained that the term *connectedness* is derived from the media system dependency theory. The authors asserted that there is a need for a more profound theoretical conceptualization in order to explain the individual-technology relationships within a context in

which larger social conditions are taken in consideration. Thus, the authors explained that the term *connectedness* "reflects a multilevel and contextual way of envisioning the relationship between individuals and technology" (p. 513).

Moreover, Jung et al. (2001) asserted that "there are important differences among income, education, age, gender and ethnic groups with regards to the quality of their relationship to the Internet" (p. 514), and that people have different tastes, goals, attitudes and expectations when they connect to this new technology. Therefore, Jung et al. (2001) argued that there is a close relationship between an individual's cultural capital – attitudes, knowledge, tastes, competence, or expectations – and his or her type of connectedness to the Internet.

Jung et al. (2001) considered that Internet connectedness should be understood and measured through "multiple dimensions of people's objective and subjective connectedness to the Internet" (p.514). Consequently, they developed the Internet Connectedness Index, which is a measure that "incorporates conventional time, history, and context measures but goes beyond them to capture the goals, activities, and centrality of Internet incorporation into the everyday lives of diverse social groups" (p. 508). In this way, the Internet Connectedness Index is a helpful research instrument to explore: the time a person spends on online activities, the history of ownership of computer and home Internet access, the different places where a person connects to the Internet, the main goals that the person wants to achieve when connecting to this new media —measured through the media systems dependency goals—, and the tasks and activities in which an individual participates when he or she connects to this new technology.

Hispanics' Computer and Internet Usage

Valdés (2002) affirmed that in the U.S., Hispanics are considered "the fastest growing Internet population from 2001, growing 19 percent from 2001-2002, more than three times the growth among non-Hispanic Internet users" (p. 235). The author explained that these Hispanics use the Internet more than those who live in their countries of origin, and Gibson (2002) considered that the Internet is transforming the way through which Hispanics in America communicate. However, the Hispanic population still plays an important role in the digital divide of the U.S. because of their disadvantaged position compared to the non-Hispanic Whites, in relation to their access and usage of the computer and the Internet (Dupagne & Salwen, 2005; Goolsbee & Guryan, 2006; Hacker, 2002; Huang & Russell, 2006; Jung et al., 2001; Lorence, Park & Fox, 2006; Ono & Zavodry, 2003). Therefore, several studies have been written about specific aspects of the current trends in computer and Internet usage of the Hispanic population in the U.S. Their findings can be summarized and classified in five categories: socio-economical, psycho-social, cultural, physical and communicational trends.

The most influential socio-economic variables on the Hispanic's role in the digital divide are income and education levels. In terms of income, Hispanics were found to be the only minority driven exclusively by their financial means when buying new communication technology (Dupagne & Salwen, 2005). In terms of the education, economically disadvantaged groups, as the Hispanics, usually are characterized by lower education (Tanno, 2003) and literacy levels, less understanding of the new technologies (Dickerson & Gentry, 1983; Wallendorf, 2001) and limited access to educational, social and professional networks that stimulate Internet interest (Attewell & Battle, 1999; Katz & Aspden, 1997) and improve further personal and professional opportunities (Huang & Russel, 2006; Krueger, 1993; Sangmoon, 2003).

Furthermore, psycho-social trends affected the Hispanic's role in the digital divide as well. Stanley's (2003) relevance, fear and self-concept were important psycho-social obstacles

for Hispanic's Internet and computer usage. Additionally, low-income and low-education Hispanics, as late Internet adopters (Goldsmith, 2001), were found to perceive this new technology as complicated (Leonardi, 2003), and to lack personal and social motivations to use it (Katz and Aspden, 1997; Korgaonkar, Silverblatt & O'Leary, 2003). This confirms Miyazaki and Fernandez's (2001) findings that negative perceptions of computers decrease with their usage.

Some cultural trends that influenced Hispanics' Internet adoption were: lack of proficiency in the English language, which was correlated with Hispanics' level of Latin heritage (Rios & Gain, 1998; Leonardi, 2003; Peñaloza, 1995; Prieger, 2003), reliance on the Internet and on peer influences as main socialization agents (Romero, 2004; Singh, Known & Pereira, 2003), usage of Hispanic Web pages to reinforce cultural pride (Korgaonkar et al., 2003), and feminine negative perception of the Internet as a technology that does not enhance communication processes (Leonardi, 2002).

Additionally, infrastructural problems and ineffective public policies in the rural areas of the U.S. were found to influence Hispanics' access and usage of the computers, the Internet and the broadband (Goolsbee & Guryan, 2006; Nicholas, 2003; Prieger, 2003). Finally, several communication trends were considered relevant for the Hispanic's Internet usage. Leonardi (2003) found that the working class Hispanics believed that the Internet had a negative impact on interpersonal communication. Also, Hispanics with higher social-economical conditions were found to have positive attitudes towards direct online marketing campaigns (Korgaonkar, Karson & Lund, 2001), even though a lack of ethnic online marketing was found (Korgaonkar, Silverblatt & Becerra, 2004; Korgaonkar, Siverblatt & O'Leary, 2001; Morton, 1997; Seitz, 1998; Singh et al., 2003). Ethnic virtual networks were found to enhance online communications and reinforce cultural heritages (Elkins, 1997; Knouse &Webb, 2001).

Literature Summary

Several concepts and current trends were reviewed in order to guide the answering of the main research questions of this study. Acculturation is the immigrants' adaptation processes to the mainstream culture (Gans, 1997). This process has been experienced by the majority of the U.S. Hispanics' through an integration approach, in which they simultaneously incorporate aspects of their own culture and maintain a positive relationship with the members of the mainstream (Faura, 2004; Gomez, 2005; Romero, 2004). A factor of great importance in the U.S. Hispanics acculturation process is media use. The media system dependency theory explains the main media dependency goals – self and social understanding, action and interaction orientation, and solitary and social play – (DeFleur and Ball-Rokeach, 1989) through which the Hispanics' Internet dependencies can be studied. Additionally, the Hispanics' Internet usage patterns can be analyzed and measured through the Internet Connectedness Index as a multidimensional process (Jung et al., 2001). Last, a research gap was found, based on the review of the scholarly studies on the current trends in computer and Internet usage of the Hispanic population in the U.S. Further study is needed to understand the Internet usage purposes and patterns of the segment of the Hispanic population with the socioeconomic means to have constant Internet access.

Research Questions

This study builds from an acculturation theoretical concept and explores the relationship that upwardly mobile Hispanics are developing with the Internet through the media systems dependency theory and the Internet connectedness concept. This study seeks to answer:

RQ1: Are there differences in the levels of acculturation between U.S-born and non-U.S. born Hispanic college students? If so, what are the differences?
RQ2: What are the media dependencies that Oklahoma's Hispanic college students pursue when they connect to the Internet?
RQ3: What are the patterns of Internet usage of Oklahoma's Hispanic college students?
RQ4: Is there a relationship between Oklahoma's Hispanic college students Internet usage patterns, Internet dependencies, and their acculturation levels?

Methods

Population and Sampling

The research was conducted through an online survey during winter 2007 at the University of Oklahoma. This university was chosen for the study because it had the largest Hispanic population of students in the state. The population for study was the University Hispanic American (U.S. born) and International Hispanic (non-U.S. born) graduate and undergraduate students. The population was chosen in order to study the relationship between Internet usage and the acculturation levels of aspiring professionals Hispanics in the U.S. The total number of Hispanic students enrolled in the University during the 2006-2007 academic year was 1146, the total number of Hispanic-American students (born in the U.S) was 978, and the total number of Hispanic-International (non-U.S. born) students was 168. The online survey was sent to all the students from the population.

Acculturation Measures

Based on Dana's (1996) and Cabasa's (2003) research on acculturation measures, two validated bidimensional and multidimensional scales of acculturation were revised in order to create a final measure of acculturation. The Bidimensional Acculturation Scale for Hispanics (BAS) (Marín & Gamba, 1996) is a "scale that measures bidirectional changes in behavior that are central to the individual in two cultural domains (Hispanic and non-Hispanic)" (p. 299), which allows the researchers to use it with different Hispanic sub-groups. The Acculturation Rating Scale for Mexican Americans-II (ARSMA-II) (Cuéllar et al., 1995) is a revision of the original ARSMA scale (Cuéllar et al., 1980) that assesses "acculturation processes through an orthogonal, multidimensional approach by measuring cultural orientation toward the Mexican culture and the Anglo culture independently" (Cuéllar et al., 1995, p. 275). The ARSMA-II scale provides a stronger measure of acculturation than the BAS by "including different cultural domains inherent in the acculturation experience and not relying solely on language-based items to capture acculturation processes" (Cabassa, 2003, p. 137).

A final acculturation scale was adapted for the present study in order to answer RQ1. The ARSMA-II Scale 1 was employed in order to measure the integration and assimilation mode of acculturation from which two independent scores can be derived: the Hispanic Orientation Score and the Anglo American Orientation score. Some ARMSA-II questions were rephrased in order to fit the general Hispanic population. The idea of generalizing the ARMSA-II in order to be able to measure not only the Mexican-Americans' acculturation processes, but also the acculturation of the general Hispanic population was initiated by the revision of the BAS. Additionally, the measurement of the consumption of English and/or Spanish Web Pages was added to the final scale to aid with the understanding of the Internet consumption of the population of the study.

The acculturation concept was measured through 30 items. The Anglo Orientation Subscale (AOS) was comprised by 13 items and the Hispanic Orientation Subscale (HOS) was

comprised by 17 items. A five-point Likert rating scale for each of the items was employed and a final acculturation score was derived from the subtraction of the individuals' HOS mean from the AOS mean. The main constructs and variables that were measured through this new acculturation scale were: ethnic self perception (Hispanic and/or American self-perception), family ethnic self-perception (parents identify themselves as Hispanics), family traditions (parents cook food from their country of origin), language usage (enjoyment of English and/or Spanish when reading, writing, speaking and thinking), language proficiency and media consumption (enjoyment of media – TV, movies and Web Pages– consumption in English and/or Spanish), and social networks (Hispanic and/or American native and current friends).

Media System Dependency Measures

The media dependency goals concept was divided into the *understanding, orientation, and play* constructs. The constructs were found to have high reliability: understanding Cronbach's alpha = .6895; orientation Cronbach's alpha = .6345; play Cronbach's alpha = .8252. From each of these constructs two variables were derived: understanding (self understanding $r=$ .489, $p=$ .000; social understanding $r=$ .474, $p=$ .000), orientation (action orientation $r=$ .219, $p=$ .001; interaction orientation Cronbach's alpha = .6369) and play (solitary play Cronbach's alpha = .7350; social play Cronbach's alpha = .8261). RQ2 included 16 statements based on the media dependency goals, derived from the media dependency scale by Ball-Rokeach, Rokeach and Grube (1984). These statements were employed by the respondents to indicate the reasons why they use the Internet. The use of several statements from each goal increased the internal validity of the research instrument.

Internet Connectedness Measures

A revised version of the Internet Connectedness Index (Jung et al., 2001) was employed to measure Hispanics' Internet usage patterns in order to answer RQ3. Internet connectedness was measured through the following constructs and variables: computer history (years of ownership of a home computer), Internet history (years of ownership of home Internet service), usage frequency (time spent on interactive activity), site of connection (places where a person connects to the Internet), Internet tasks (tasks for which a person connects to the Internet) and Internet activities (participation in different types of Internet and Web activities). The students' Internet usage patterns were measured through 20 statements that were individually analyzed, and average individual Internet usage scores were derived from the sum of these statements.

Additionally, RQ4 results were obtained through the correlation of the Hispanic college students' acculturation level, Internet usage patterns and Internet dependencies, controlling for their demographic and socioeconomic variables. The demographic and socioeconomic constructs and variables that were explored are: education (education level), U.S. family generation (number of family generations living in the U.S.), economic level (parents' economic and education level), gender (masculine or feminine), foreign origin (country of origin and family country of origin), and age.

Results

Of the 1146 surveyed students, 225 responses were received, a response rate of 20 percent. Of the 978 U.S.-born students, 127 answered the survey, a response rate of 13 percent. Of the 168 non-U.S. born students, 97 answered the survey, a response rate of 58 percent.

Respondent's general demographics:
- 116 (52%) female, 95 (42%) male, 14 (6%) did not respond;
- Ages ranged from 18 to 57, with the average age being 23.95;
- Place of birth of the Hispanic students: 2 (1%) in Argentina, 6 (3%) in Bolivia, 1 (0.44%) in Dominican Republic, 1 (0.44%) in Chile, 23 (10%) in Colombia, 4 (2%) in Ecuador, 1 (0.44%) in France, 4 (2%) in Germany, 2 (1%) in Guatemala, 10 (4 %) in Mexico, 1 (0.44%) in Nicaragua, 2 (1%) in Panama, 8 (4%) in Peru, 4 (2%) in Puerto Rico, 127 (56%) in the U.S, 28 (12%) in Venezuela, 1 (0.44%) did not respond;
- Number of family generations living in the U.S: 89 (40%) 1st generation, 83 (37%) 2nd generation, 17 (7%) 3rd generation, 22 (10%) 4th generation, 10 (4%) 5th generation, 4 (2%) did not respond;

Respondents' socio-economics:
- Students' education level: 23 (10%) Freshmen, 33 (15%) Sophomore, 28 (12%) Junior, 65 (29%) Senior, 54 (24%) Master/MBA, 20 (9%) PhD, 2 (1%) did not respond;
- Students' parents total annual household income: 32 (14%) under $25,000, 43 (19%) $25,000 to $35,999, 30 (13%) $36,000 to $45,999, 24 (11%) $46,000 to $55,999, 16 (7%) $56,000 to $65,999, 9 (4%) $66,000 to $75,999, 65 (29%) $76,000 or more, and 6 (3%) did not respond.

The first research question asked if there are differences in the levels of acculturation between U.S- born and non-U.S. Hispanic college students. To answer this question, bidimensional subscales based on ARSMA-II were derived from the 30 survey items that measured the students' acculturation level. The Anglo Orientation Subscale (AOS) was comprised by 13 items, and the Hispanic Orientation Scale (HOS) was comprised by 17 items. Following the ARSMA-II Scale, the subsequent procedures were executed: The sum of the AOS scale was divided by 13 to obtain a mean score of the sub-scale, and the sum of the HOS scale was divided by 17 to obtain a mean score of the sub-scale. Then, in order to obtain a linear acculturation score of the individual on a continuum from very Hispanic oriented to very Anglo oriented, the HOS mean was subtracted from the AOS mean. The final mean constitutes the students' individual acculturation score, which can be interpreted through Cuéllar et al.'s (1995) cutting scores for determining acculturation levels. These cutting scores range from very Mexican (Hispanic for this study) oriented (< -1.33), to very Anglo oriented (>2.45).

The survey results indicate that the U.S.-born Hispanic respondents have a composite acculturation score of .7441, which suggests that those students are "slightly Anglo oriented" (p. 265), while maintaining bicultural self perceptions. For the non-U.S. born students, the acculturation score is -.4349, a figure that suggests that these students are more Hispanic oriented, but also maintaining bicultural self perceptions. In order to test for the differences between the acculturation levels of these two groups, a one sample t-test was employed. The t-test results indicate that the non-U.S. born Hispanic students are statistically significant less acculturated than the U.S-born Hispanic students, and the U.S-born Hispanic students are statistically significant more acculturated than the non-U.S. born Hispanic students (t= -9748, df= 222, p< .001).

The second research question asked: What are the media dependencies that Oklahoma's Hispanic college students pursue when they connect to the Internet? Descriptive statistics were employed to answer this question. The overall Internet dependency of the Hispanic students is

moderate with a quotient mean of 3.25, derived from a 5-point Likert scale, in which 1 means no Internet dependency and 5 means a very high Internet dependency

The Internet dependency goals were analyzed by concepts, and the results showed that the students mostly use the Internet for *understanding* goals (quotient mean of 3.48), then for *play* goals (quotient mean of 3.22), and somewhat less for *orientation* goals (quotient mean of 3.11). These scores show that the Hispanic students have different degrees of mid-level Internet dependencies. The strongest dependencies are for understanding, which are related to the respondents' interests in using the Internet to assist them to know better the world around them, and to learn how to better understand themselves. Play dependencies are somewhat less strong but still moderate, and these generally involve using the Internet for passing time, relieving boredom and being entertained. Overall, orientation dependencies were the least strong; however, there were some quite strong orientation dependencies in regard to keeping up with current events and knowing were to shop (See table 1).

Table 1: Internet Dependencies

	Mean	Standard Deviation
Overall Internet Dependency	3.25	.68
By Concept		
Understanding	3.48	.81
Play	3.22	.81
Orientation	3.11	.73
By Sub-Concept		
Self Understanding	3.18	1.05
Social Understanding	3.78	.86
Solitary Play	3.30	.81
Social Play	3.10	1.08
Action Orientation	3.77	.80
Interaction Orientation	2.67	.93

In accordance with the media system dependency theory, each concept was measured through sub-constructs at the individual and social level, to show in detail how respondents depend on the Internet to achieve their media goals. Understanding dependencies differ substantially at the self and social levels. Social understanding dependencies are stronger than self understanding dependencies, with respondents indicating that they rely on the Internet to find out world and community news much more than to learn about themselves. The respondents also have somewhat stronger solitary play than social play dependencies, indicating that the Internet provides something to do when alone and a way of passing time and avoiding boredom. The greatest difference between individual and social dependencies was found in the orientation goal, through which it can be observed that the students reflect a strong action (individual) orientation dependency and a comparatively low interaction (social) orientation dependency. The strongest orientation dependencies are providing the students a way to keep up with current events and to make buying decisions, much more than as a tool to impress others (See Table 2).

Table 2: Internet Dependency Statements by Sub-concepts

Self Understanding	Mean	SD
Learn new skills and improve new ones.	3.49	1.15
Learn about myself.	2.86	1.29
Social Understanding		
Find out what is happening in the world.	4.15	0.84
Stay on top of what is happening in my community.	3.40	1.16
Solitary (Self) Play		
Have something to do when alone.	3.84	1.13
Pass time or avoid boredom.	3.74	1.11
Entertain myself.	3.40	1.01
Pretend that my life is different.	1.63	1.09
Social Play		
Share my entertainment interests with friends & family.	3.34	1.24
Recreate with friends.	3.16	1.22
Build fun social relationships.	2.80	1.32
Action (Self) Orientation		
Keep up with current events.	3.96	1.00
Decide what to buy and where to buy it.	3.59	1.06
Interaction (Social) Orientation		
Feel connected with others.	3.12	1.30
Express my opinions.	3.00	1.19
Decide how to impress others.	1.88	1.16

N=225 Statements measured by a 5-point Likert-like intensity scale where 1=never and 5=always

The U.S.-born students' Internet dependencies were compared with the non-U.S. born students' dependencies, and their differences were analyzed through independent samples t-tests. The results show that overall both groups have a similar degree of Internet dependencies, in which the non-U.S. born dependencies are slightly higher (3.32 overall mean) than the U.S.-born dependencies (3.21 overall mean). Although this difference is not statistically significant, it is worth noting that the dependencies are strong for non-U.S. born students for each concept, and the understanding and orientation differences approach significance (See table 3).

Table 3: T-tests comparing U.S.-born and Non-U.S. born students' Internet Dependencies

	U.S-born		Non-U.S.-born		
	Mean	SD	Mean	SD	Significance
Overall Internet dependencies	3.21	.57	3.32	.73	.212
Understanding	3.42	.72	3.60	.84	.095
Play	3.21	.69	3.26	.90	.658
Orientation	3.06	.64	3.20	.78	.128

The differences between U.S.-born and non-U.S. born responses to the dependency constructs were tested, and an almost statistically significant difference shows that the non-U.S. born students have higher social understanding and action orientation dependencies. To get a better picture of the Hispanic students' Internet dependencies, the differences in the responses for the individual statements of both groups were also tested. An almost statistically significant difference indicates that the non-U.S. born students use the Internet more to find out what is happening in their communities and to learn new skills and improve old ones. A statistically significant difference indicates that the non-U.S. born students depend more in the Internet for

purchasing decisions. Last, the only statement that approached significance in which U.S. born respondents indicate a stronger dependency is to pass time and avoid boredom (See Table 4).

Research question three asked: What are the patterns of Internet usage of Oklahoma's Hispanic college students? The respondents' Internet usage locations were tested through a 5-point Likert scale, in which 1 represented zero days a week and 5 represented seven days a week. In general, the places were the students connect more to the Internet are their home, school and work, and the places were they connect less to the Internet are community centers or community organizations, public libraries and commercial communication centers. (See Table 5).

Table 4: T-test comparing Internet Dependencies by Sub-concepts of U.S.-born and Non-U.S. born

	U.S-born		Non-U.S.-born	
	Mean	**SD**	**Mean**	**SD**
Self Understanding	**3.12**	**.97**	**3.28**	**1.11**
Learn new skills and improve new ones.	3.38*	1.06	3.67*	1.21
Learn about myself.	2.87	1.18	2.89	1.40
Social Understanding	**3.71***	**.81**	**3.90***	**.84**
Find out what is happening in the world.	4.11	0.81	4.24	.78
Stay on top of what is happening in my community.	3.31*	1.10	3.56*	1.18
Solitary (Self) Play	**3.31**	**.71**	**3.32**	**.87**
Have something to do when alone.	3.78	1.13	3.97	1.05
Pass time or avoid boredom.	3.87*	1.05	3.61*	1.12
Entertain myself.	4.06	.90	3.95	1.08
Pretend that my life is different.	1.54	.95	1.77	1.25
Social Play	**3.07**	**1.00**	**3.17**	**1.15**
Share my entertainment interests with friends & family.	3.32	1.20	3.40	1.26
Recreate with friends.	3.12	1.12	3.24	1.30
Build fun social relationships.	2.77	1.27	2.87	1.37
Action (Self) Orientation	**3.70***	**.78**	**3.90***	**.74**
Keep up with current events.	3.99	.96	3.95	.98
Decide what to buy and where to buy it.	3.42**	1.04	3.86**	.98
Interaction (Social) Orientation	**2.63**	**.81**	**2.74**	**1.03**
Feel connected with others.	3.05	1.21	3.25	1.39
Express my opinions.	2.93	1.04	3.12	1.32
Decide how to impress others.	1.91	1.03	1.85	1.31

N=225 Statements measured by a 5-point Likert-like intensity scale where 1=never and 5=always
* p< .10   ** p< .05

Table 5: Frequency and Location of Internet Usage

Places	Mean	Days a Week
Home	4.56	6 to 7
Work	3.00	3 to 4
School	3.68	4 to 5
Community Center or Org.	1.24	0 to 1
Public Library	1.61	1
Comercial communication center	1.33	0 to 1

Key: 1 = 0 days a week, **2** = 1 to 2 days a week, **3** = 3 to 4 days a week, **4** = 5 to 6 days a week, **5** = 7 days a week

The students were also asked about their Internet access history, Internet usage frequency, online tasks and online activities preferences. The results show that the average time that the students have had Internet access at home is 6 years and 4 months, and the average time they spend connected to the Internet is 6 hours and 38 minutes a day. Also, based on a 5-point Likert scale, in which 1 represented never and 5 always, the results show that the students often

spend their online time accomplishing school-related (3.67), and personal-related (non-school and non-work) tasks (3.63), and that they sometimes spend their online time accomplishing work-related (non-school) tasks (2.76). The activities for which the students engage the highest with the Internet are online information research and social networking through e-mailing. The activity for which the students use the Internet the lowest is online game playing. Additionally, the students moderately use the Internet for getting information through bulletin boards and online news groups, chatting with their friends and family, and doing online shopping (See Table 6). Last, the total time a week that the students spend in online activities interacting with other people (such as newsgroups, bulletin board, chat rooms, game-playing) is from two to three days.

Table 6: Time Per Day Involved in Internet Activities

Activities	Time	SD
Bulletin Board	38 min.	1.22
Online Chat Room	40 min.	2.03
Online Game Playing	16 min.	.76
E-mailing	1 hour and 44 min.	1.92
Online News Groups	30 min.	.82
Online Information Research	2 hours and 2 min.	2.15
Online Shopping	33 min.	.72
Average Online Time	**6 hours and 38 min.**	**5.30**

The fourth research question asked if there is a relationship between the students' Internet usage patterns, Internet dependencies, and their acculturation levels. A partial correlation was used to test for these relationships, controlling for the demographic and socioeconomic variables (students' education, gender, age, place of birth, their U.S. family generation and family annual income). The acculturation of the students was tested in relation to media dependency concepts (orientation, understanding and play), and with the general Internet usage constructs.

A statistically significant negative correlation ($r= -.1417$, $p= .048$) was found between the students' acculturation and their Internet orientation dependencies, which indicates that the students who are more acculturated use the Internet less for orientation goals, and the students that are less acculturated use the Internet more for orientation goals. There is an almost statistically significant negative correlation ($r= -.1331$, $p= .064$) between the students' acculturation and their Internet understanding dependencies, which indicates that the students who are more acculturated use the Internet less for understanding goals, and the students that are less acculturated use the Internet more for understanding goals. There is no statistically significant correlation ($-.0418$, $p= .562$) between the students' level of acculturation and their Internet play dependencies. There is an almost statistically significant negative correlation ($r= -.1250$, $p= .082$) between the students' level of acculturation and their Internet connectedness, indicating that the students who are less acculturated use the Internet more than the students that are more acculturated. Last, all three dependency concepts have a statistically significant positive correlation with the students' Internet connectedness, indicating that those students who use the Internet more have stronger Internet dependencies than those students who are less frequent Internet users (See Table 7).

Table 7: Partial Correlations Among Acculturation, Internet Dependency and Internet Usage (Controlling for Education, U.S. Generation, Family Income, Gender, Age and Place of Birth)

	Acculturation	Orientation Q	Understanding Q	Play Q	Internet Connect.
Acculturation	1.00	-.1417**	-.1331*	-.0418	-.1250*
Orientation Q		1.00	.6494 **	.6776 **	.1425**
Understanding Q			1.00	.4899 **	.2925**
Play Q				1.00	..2666**
Internet Connect.					1.00
* p<.10 **p< .05					

Discussion

This research sought to comprehend the relationship between the Hispanic university students' acculturation levels and their Internet usage. In order to accomplish this purpose, the acculturation levels, Internet dependencies and Internet connectedness patterns of the U.S.-born Hispanic and non-U.S. born Hispanic students from the University of Oklahoma were studied through an online survey. The acculturation, media dependency and Internet connectedness concepts constituted the theoretical basis that guided this study. The results showed that the Hispanic university students use the Internet as a mechanism for acculturation.

From the acculturation concept, a bidimensional acculturation scale was applied following the ARSMA-II (Cuéllar et al., 1995), in order to better understand the acculturation levels of the Hispanic students. The results show statistically significant differences in the levels of acculturation between U.S.-born and non-U.S. born Hispanic college students. These differences indicate that the U.S.-born students are slightly Anglo oriented, and the non-U.S. born students are more Hispanic oriented. However, both groups maintain bicultural self perceptions, reinforcing Romero's (2004) contention that most Hispanics' acculturation processes are characterized by the *integration* approach, since they simultaneously incorporate aspects of their own culture and maintain a positive relationship with the members of the mainstream. Romero explained that the acculturation process is facilitated by the usage of English language, the adoption of media with English content, and the social contact with English speaking people, which are all factors that are present in the everyday life of the students enrolled in a U.S. university.

The media dependency theory affirms that the Internet is used for understanding, social, and play dependencies at the individual and social level (DeFleur and Ball-Rokeach, 1989). Overall, the results show that the Hispanic students have different degrees of mid-level Internet dependencies. They present moderately strong understanding and play dependencies, and moderate orientation dependencies. Based on these results, it can be affirmed that the Hispanic students moderately depend on this new media to understand the world around them and their role in their surrounding cultural environment, to release tension through online recreational activities, and to guide their personal decisions and social interactions. The understanding dependency is mostly observed through social goals, and the play and orientation dependencies through self goals.

From the self and social measures for each dependency, it was found that the students' stronger Internet dependencies are social understanding and self orientation. Therefore, it can be specifically interpreted that the students mostly use the Internet to learn about what is happening

in the world and in their communities, and to gather information in order to make everyday decisions. Moreover, from the disagreement that the students expressed to the statements "pretend that my life is different" or "decide how to impress others", it can be affirmed that they do not rely on the Internet to escape from their real identities, but to understand how to act in the real world.

Furthermore, the Internet dependencies of the U.S.-born Hispanic students were compared with those of the non-U.S. born Hispanic students. The results show that both groups of students have a similar degree of overall Internet dependencies. However, the U.S.-born students depend less on the Internet than the non-U.S. born students for social understanding and action (self) orientation dependencies. In this way, the non-U.S. born Hispanics, who are less acculturated than the U.S.-born Hispanics, are using the Internet more to understand the world around them and to orient their actions in a new culture.

A revised version of the Internet Connectedness Index (Jung et al., 2001) was employed as a multidimensional measure to better understand the Hispanic students' Internet usage patterns. The results show that the average time that the students have owned a personal computer at home is 9 years, and the average time that they have had Internet access at home is 6 years and 4 months. Therefore, it can be interpreted that Internet access has not been a problem for these Hispanics. Moreover, these results are reinforced by the fact that the students reported that they do not have the need to connect to the Internet at community centers or organizations, public libraries, or at commercial communication centers, since they spent most of their online time at their home, school and work. Additionally, the students reported to be heavy Internet users, since they affirmed to spend about 6 hours and 38 minutes a day connected to the Internet. Some students might have over reported their Internet usage time. However, these results clearly affirm that these Hispanics do not have Internet usage limitations, are not negatively affected by the digital divide, and represent a potential and promising target for WebPages that effectively address their needs and wants.

The results also show that the students often spend their online time accomplishing school-related and personal-related (non-school and non-work) tasks, and that the online activities in which they engage more frequently are online information research and social networking through e-mailing. The students moderately use the Internet for getting information through bulletin boards, for participating in online news groups, for interacting with their friends and family through chat rooms and for online shopping. The activity for which the students use the Internet the lowest is online game playing.

Last, the students who are less acculturated use the Internet more than the more acculturated students for understanding the world around them and their place on it, for orienting their actions, and for engaging in bulletin board, chat room, e-mailing, news groups, information research and shopping activities. This information reaffirms that the less acculturated Hispanic students are using the Internet as a tool that aids them to orient their social interactions and to better understand and adapt to the U.S. culture.

The main practical implications for media practitioners interested in serving the wants and needs of the growing professional-to-be Hispanic population in the U.S. through online content are: Hispanic students are heavy Internet users with no access limitations. Those students who are less acculturated have high social understanding and action (self) orientation Internet dependencies, and low play Internet dependencies. Therefore, the WebPages that attempt to address the acculturation needs of these Hispanic students should mainly consider including the following online content: events and news about their new communities that help them

understand their surrounding social environment , national and international news that connect them with their Hispanic countries of origin in order to address their bicultural needs, specialized information (i.e. job offers, current trends and researches) that helps them to immerse in the U.S. professional world, directories and practical suggestions to facilitate everyday activities (i.e. doctor or lawyer contact information), and targeted information of product and services that aids them in their everyday purchasing decisions.

Limitations and Further Research

The main limitation of this research is the U.S.-born students' relatively low response rate, which is a common drawback of online surveys. In order to enhance the reliability of the results, it is recommended to replicate the research with a different sample from the U.S. Hispanic university students' population. Also, it will be relevant to replicate the study with U.S. Hispanic professionals, in order to know how much does their Internet dependencies differ from those of the students. Additionally, more detailed further research could be done to better understand how the Internet influences the U.S. Hispanic students' acculturation processes. Since most of the students identified themselves as first and second generations in the U.S, further research will aid on the understanding of how much of the students' Internet usage is dedicated to communicate with their family members and friends at their country of origin or their parents' country of origin, as opposed to communicate with their social networks at the U.S. Also, it will be relevant to specifically know how much of the students' online research is dedicated to finding news from their Hispanic countries of origin, in contrast to finding news from the U.S. Last, in order to thoroughly understand the students' U.S social interactions, it will be relevant to find out how much of the students' Internet usage is dedicated to communicate with U.S. Hispanic social networks as opposed to U.S. non-Hispanic social networks.

Conclusions

Overall, the main findings of this research suggest that the Internet is a tool for acculturation and that the types of goals that the students seek to fulfill through the use of this new media are indicated by their Internet dependencies. Partial correlations indicate that those who are less acculturated have statistically significant higher orientation and understanding dependencies. Play dependencies are not significant for the students' acculturation. These findings hold after controlling for 6 demographics and socioeconomic variables through a robust statistical correlations test. The main practical implication of the study resides on the fact that U.S. Hispanic students are heavy Internet users whose acculturation needs and wants can be addressed through tailored WebPages that satisfy their Internet social understanding and action (self) orientation dependencies.

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The Spanish-Language Crónica in Los Angeles:
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Within the context of the anti-Mexican hysteria that affected white Los Angeles during World War II, Luis Valdez's musical play Zoot Suit (1979) portrays the worst side of the Los Angeles English-language press.[1] The first Chicano play to be represented on Broadway, it opens with headlines such as "Zoot-Suiter Hordes Invade Los Angeles. US Navy and Marines Are Called in" (Zoot Suit 24), which unfairly blame the flamboyant zoot-suiters for the so-called Zoot-Suit Riots. As Eduardo Obregón Pagán demonstrated in Murder at the Sleepy Lagoon: Zoot Suits, Race, and Riot in Wartime L.A. (2003), this violent confrontation was actually caused by sailors and soldiers stationed in the city. Other racist headlines describe the wave of Mexican crime that is allegedly destroying Los Angeles. A mythical character named El Pachuco who acts as a Greek chorus or, rather, as the social conscience of his community, explains that "zoot-suiter" is, in reality, a euphemism used by the press to attack Mexicans. He also tries to raise awareness among other pachucos like Henry "Hank" Reyna, the leader of the so-called 38th Street gang, inspired by real-life Henry Leyvas: "Because this ain't your country. Look what's happening all around you. The Japs have sewed up the Pacific. Rommel is kicking ass in Egypt but the Mayor of L.A. has declared all-out war on Chicanos. On you! ¿Te curas?" (30). In all, the play reveals a collective conspiracy led by the mayor and law enforcement, but especially by the press against the Mexican community of Los Angeles. Alice, a young Jewish lawyer who is trying to help the youngsters, explains to the imprisoned Henry Reyna that, according to the press, the alleged pachuco crime wave is being directed by the fascists or by the Japanese Americans from inside the relocation camps. In her own words, there are also ulterior motives for unfairly blaming these young Chicanos for the Sleepy Lagoon murder and the Zoot-Suit riots: "Are you aware you're in here just because some bigshot up in San Simeon wants to sell more papers?" (49).[2]

In direct contrast with the animosity displayed by the Los Angeles English-language press, the Spanish-language print media has traditionally been a tool for unity and self-defense for the Mexican American community. In particular, the Spanish-language crónica, a genre akin to the New Journalism of North American writers such as Tom Wolfe, Hunter Thompson, Norman Mailer and Truman Capote, is a testimony to the active participation of Mexican Americans not only in the Mexican Revolution but also in the domestic politics of the United States. In the next pages, I shall study the main topics and stylistic traits of the Spanish-language crónica in Los Angeles as well as its influence on the Chicano community. This journalistic genre, which was widely practiced in the nineteenth century by the Mexican modernista Manuel Gutiérrez Nájera among others, is still being used today by some of the most renowned cultural critics in Mexico,

including Carlos Monsiváis and Elena Poniatowska.[3] Most specialists usually underscore the importance of time, the interaction between past and present events, and the ethical approach in the crónica. This peculiar way of expressing ideas is designed to keep the readers' attention. Like the reportaje, the crónica requires a previous investigation; the latter, however, emphasizes the cronista's own subjective interpretation of the facts. Similarly, the centrality of language brings it closer to literature. This awareness of style makes the crónica a more sophisticated genre in the eyes of some journalists. In this sense, Linda Egan has defined it as a distinct literary genre:

> The chronicle is, clearly, related to the essay, but its distinctive textual persona feeds expectations that we will experience as something more than a lecturer sharing insights or recommendations on a significant current topic. We expect to be entertained and at the same time to be challenged in a peculiarly personal way, to be surprised by the crónica's excess. In this respect, the chronicle exceeds not only the generic limits of the essay but also of history, journalism, sociology, anthropology, metaphysics, comparative religion, philosophy, and other assertive genres. (117)

Carlos Monsiváis has also pointed out the nostalgic tone that often characterizes this journalistic subgenre. In contrast, he explains, the reportaje, less concerned with personal style, is more political and prone to sensationalism and denunciation.[4] Nicolás Kanellos, in turn, defines the Latin American crónica as "a short, weekly column that humorously and satirically commented on current topics and social habits" ("Socio-Historic" 116). It owes its origins, he adds, to Addison and Steel in England and to Mariano José de Larra in Spain. More relevant to this study, Kanellos claims that in the Southwest of the United States, the crónica took on different goals, such as spreading nationalism and cultural pride among Mexican Americans:

> From Los Angeles to San Antonio and up to Chicago, Mexican moralists assumed pseudonyms and, from this masked perspective, commented satirically in the first person as witnesses to the customs and behavior of the colony whose very existence was seen as threatened by the dominant Anglo-Saxon culture […] It was the cronista's job to fan the flames of nationalism and enforce the ideology of "México de afuera." He had to battle the influence of Anglo-Saxon immorality and Protestantism and protect against the erosion of the Spanish language with equally religious fervor. ("Socio-Historic" 116)

These journalistic texts represent the birth of Spanish-language publishing in Southern California. According to Raymund A. Paredes, Los Angeles Mexican-American writing (although perhaps we should say publishing) "dates from the 1850s, when El Clamor Público and other local Spanish-language newspapers began to publish poems and fictional sketches, some of which treated aspects of Los Angeles life. But these works are of limited interest and the fact remains that extended fictional works about Los Angeles by Mexican-American authors did not appear until the 1970s" (240-41). For many years, prominent Latin American intellectuals have published crónicas in Los Angeles-based Spanish-language newspapers. Today, La Opinión, one of the nation's oldest surviving and continuously published Spanish-language newspapers (along with the New York-based La Prensa), and Hoy, a new local edition published by the Tribune Corporation, provide continuity to this heritage of Latino journalism in Los Angeles. Yet, as Víctor Valle pointed out in an interview, overall, Los Angeles's long tradition of

excellent journalism has progressively deteriorated into a business that is more interested in making money than in creating original writing. In many cases, such as those of Enlace (San Diego) and Hoy (Los Angeles and New York), the newspaper is based on the quick translation of articles from mainstream English-language newspapers. As a result, Valle concludes, the level of Spanish language is lower and issues of concern to the Latino community are generally ignored. At a different level, this is also the case of La Opinión; although, in this case, the concern for Latino issues is significantly higher. In any case, for a city that has had sixteen different Spanish-language newspapers and that is home to the largest Latino community in the nation, the increasing dependence on translation from English-language news is, undoubtedly, a matter of concern. Valle contends that, instead of building on traditionally Hispanic genres, such as the crónica, more and more Latino journalism is becoming poor-quality imitation. The more news that is translated, the less connection to Latino issues there will be. Ownership of Spanish-language newspapers by Anglo corporations seems to be, along with the lack of economic means, the main source of this problem: it prevents these newspapers from continuing the tradition of acting as the voice of Latinos against Euro-American hegemony in the region. Instead of being an outlet for Latino concerns and a vehicle for influence and change in public policy, many Spanish-language newspapers in Southern California (and in the rest of the country, for that matter) are simply facilitating acculturation and reflecting the ideology of the dominant culture. Therefore, the initial decolonizing objectives of these publications have vanished to become, paradoxically, yet another colonizing tool.

The familiarity of both Latina and non-Latina journalists with traditional forms of Spanish-language journalism such as the crónica could facilitate the goal of incorporating and reaching out to Latino readers' sensibility. In this sense, Valle has lamented the hiatus between Latino reporters and their Anglo editors: "Because U.S.-styled journalism also perpetuates the parochialism, the minority reporter bears the full burden of translating his or her culture to an often indifferent or hostile editor. In my case, this meant that a whole universe of signs was unavailable to most of my editors because they were monolingual and monocultural" ("Chicano Reporter" 264). Along these lines, he contrasts the descriptive approach of mainstream journalism to the "Latin intellectual style that is more literary, discursive, overtly ideological, and interested in broader conceptions of social and cultural history. Works of art, literature, or ordinary news events become points of departure for philosophical or cultural meditations" ("Chicano Reporter" 266-67).

Indeed, in many ways the trials of the Chicano community in Southern California find a mirror image in the Spanish-language press of the region. Although during the Spanish and Mexican periods there were no Spanish-language newspapers in Los Angeles, later sixteen different ones would appear. In Trevino's view, this can be partly explained "as a conscious effort to preserve Mexicano cultural integrity" (13). After the Californios lost their land and their political power to the Anglos as a result of the US-Mexican War of 1846-1848 and many of the agreements of the Treaty of Guadalupe Hidalgo were flagrantly violated by the U.S. government, the Spanish-language press became a medium where they could vent their indignation, defend their culture, and fight for their rights. As previously stated, it was also a vehicle for cultural affirmation, where they could praise Mexican literature and history, and defend the Spanish language and Catholicism (Trevino 17). According to Richard Griswold del Castillo, there were two

types of newspapers: on the one hand, some were long-lived and influential, and represented the opinions of the wealthy native Californios, such as La Estrella, El Clamor Público, La Crónica, and Las Dos Repúblicas; on the other hand, the other newspapers (La Voz de la Justicia, El Eco de la Patria, El Joven, La voz del Nuevo Mundo, and El Eco Mexicano) had a more popular background, but were short-lived and poorly funded by Mexican immigrants (The Los Angeles 125-26).[5]

Ramón D. Chacón has studied the way in which the Los Angeles newspaper El Heraldo de México, founded in 1915, safeguarded the interests of Mexican working-class immigrants and Chicanos. As he reveals, the newspaper, guided by its nationalistic fervor, claimed to be the "Defender of the Mexicans in the United States" against discrimination and exploitation (50). Following this goal, it published information about job opportunities in the Southwest of the United States and in Baja California as well as about the changing immigration policies of the United States and Mexico. More importantly, El Heraldo de México created an association called "Liga Protectiva Mexicana de California" (Mexican Protective League of California) to protect the rights and interests of Mexican immigrants and Chicanos

Francisco P. Ramírez, the Founding Father

One of the leaders of these protests against the oppression of Latinos was the Angelino teenager Francisco P. Ramírez (1837-1908). In June 1855, he founded and became the editor of the first Spanish-language newspaper (and the third newspaper) of Los Angeles: the four-page El Clamor Público (The Public Outcry), which lasted until December 31, 1859.[6] Félix Gutiérrez reveals that El Clamor Público was an outgrowth of the Spanish section of the bilingual Los Angeles Star, which was the first newspaper in Los Angeles: (4). Through his new newspaper, Ramírez chronicled his community's odyssey into the disempowered status of second-class citizens. As several critics have observed, he went from a moderate tone that supported the ideals of the U.S. Constitution and promoted cooperation between Mexicans and Anglos to a more radical mode. In this second period he protested slavery and racial inequalities, scolded Mexicans for not standing up against Anglo oppression, and supported Mexican liberalism and public education for girls (Gutiérrez 5-7, Gonzales 51).

An example of this last tone and of the specific goals of the crónica in the American Southwest is "La doctrina de Monroe," published in El Clamor Público on January 29, 1859 (vol. IV, no. 31, p. 1). There, Ramírez condemns the Monroe Doctrine, which, in his view, will end up isolating the United States. If North America, he declares, does not allow Europe to intervene in matters related to the Americas, then logically European powers will not allow North America to interfere in matters related to Europe and other parts of the world. He dares to call the doctrine an "arrogant and unsustainable aspiration."[7] By the same token, "Folleto notable" (Notable Leaflet), also published in El Clamor Público (March 19, 1859, vol. IV, no 38, p. 1), calls for an alliance of the Latin nations of the New and the Old World, and more specifically for a Franco-Spanish alliance, to put an end to North American annexationism. By so doing, he shows his awareness of foreign affairs, his familiarity with the foreign press, and his unyielding opposition to Washington's belligerent foreign policy. The leaflet mentioned in the title was published in the French journal Courier des Etats

Unis under the title "Letter to His Majesty Emperor Napoleon III about French influence in America, and Mr. Buchanan's message." Making a connection between contemporary international politics and European religious history, Ramírez praises the "civilizing history" of Latin European nations and describes the new attitude of North American Anglo-Saxons as a continuation of the reformation initiated by Martin Luther. In his view, the clash between Latin American nations and the United States is not only the embodiment of the dichotomy between civilization and barbarism, but also a racial and religious war that began in Europe during the Protestant Reformation: "The United States is the senseless Reformation that, unable to triumph over Latin civilization with Coligny's support, crossed the oceans to return with renewed strength to fight against that civilization."[8]

Ramírez also warns against Washington's insatiable thirst for territorial conquest. Condemning the Monroe Doctrine, he cites its objective of taking over Cuba, Mexico, and Central America as a first step for conquering South America, Europe, and the rest of the continents. Without reservations, the pro-European Ramírez considers the President of the United States, James Buchanan (in office March 4, 1857-March 4, 1861), a "filibuster" and a threat to Latin nations on both sides of the Atlantic. The only way to save civilization, he assures, is the aforementioned alliance of the "Latin races": "[Pres. Buchanan] knows very well that, once the fight has begun, his triumph is assured, the isthmus and the island will be his prey, and nothing will stop his invading march to the south, his destructive flight toward Europe."[9] In all, as Félix Gutiérrez states, "Ramírez used the press to inform his readers of their rights, expose injustices and inspire action. His reports and editorials had a special ring of truth because he also was experiencing the same conditions he was reporting in his newspaper" (11). Yet, along with his defense of Californios, Hispanics and their cultures, and his proposal to move to the Mexican State of Sonora, Ramírez advised Californios to learn the English language and "urged the acquisition of Anglo American traits on the grounds of 'expendiency,' that is, for survival" (Trevino 34). In this way, Trevino argues, the Spanish-language press reflects the beginning of a long biculturation process among middle- and upper-class Californios.

Ricardo Flores Magón, the Radical

Another prominent figure in the Spanish-language journalism of Los Angeles is Ricardo Flores Magón (1873-1922), editor of the journal Regeneración. He was born in Oaxaca, Mexico, and, for the last eighteen years of his life, he lived (along with his brother Enrique) in the United States, where he went into exile after Porfirio Díaz's government blacklisted him in 1904 and forbade him to publish any of his writings in Mexico. As Juan Gómez-Quiñones points out, Flores Magón's writings prove that "Chicanos participated in the Mexican Revolution through the activities of the PLM, [Partido Liberal Mexicano; Mexican Liberal Party] while, at the same time, they took part in the radical movement in the United States."[10] Two of the radical organizations that attracted more Mexican American active membership, explains Gómez-Quiñones, were the Socialist Party (SP) and the Industrial Workers of the World (IWW) (Roots 346).

While he was still a law student, Ricardo Flores Magón, along with the lawyers Jesús Flores Magón and Ricardo Horcasitas, founded the journal Regeneración. Although it was founded in Mexico on August 7, 1900, in the United States it was published for the first time in 1904 in San Antonio, Texas, and one year later in St. Louis, Missouri (Gómez Quiñones, Las ideas 39). "Because of the threat of discovery and arrest," explains Ward S. Albro, "the junta journal which appeared for the first time in Los Angeles on June 1, 1907, was titled Revolución, not Regeneración" (80). In Los Angeles it was edited by Anselmo Figueroa and Ricardo Flores Magón.[11] According to Richard Griswold del Castillo, "Regeneración downplayed Mexican nationalism and emphasized multi-national, multi-ethnic working class solidarity in a struggle against liberalism and capitalism [and] advocated violent revolt, anarchy and the total destruction of the existing order" ("Mexican" 42). Many of Ricardo Flores Magón's crónicas were written and published in this Los Angeles newspaper.

Flores Magón and Feminism

Gómez-Quiñones has studied the PLM's ideas about the role of women in the political struggle: "there was a strong emphasis, albeit qualified, on the role of the women in the struggle and in women's rights. This emphasis was reflected in the key roles played by many Mexican women in the party and in affiliated organizations" (Roots 345). In this context, in "A la mujer" (To Woman), published in the Los Angeles journal Regeneración on September 24, 1910, Flores Magón provides a good example of the chronicle that is trying to raise political awareness, this time among women. Following the anarchist principles of the PLM, of which Flores Magón was leader, he attempts to promote equality among men and women. This progressive stance, however, is not without flaws. First, he seems to encourage a feminist and suffragette positionality. From this perspective, Enrique Ochoa Ávila has underscored the way in which Flores Magón proposed equal rights for men and women, and even appealed for matriarchy: "The vindications he suggests to women are not different in essence from the ones he suggests to men, since they are addressed to the struggle for emancipation."[12] Yet in other passages Flores Magón relegates women to a passive position in society, encouraging them to be a mere shadow of their men: "Your duty is to help man; to be there to encourage him when he vacillates; stand by his side when he suffers; to lighten his sorrow; to laugh and to sing with him when victory smiles. You don't understand politics? This is not a question of politics; this is a matter of life or death."[13] The same patronizing tone continues throughout the crónica: "She is not as prepared as men for the industrial struggle, nor is she organized with the women of her class to fight alongside her brother workers against the rapacity of capitalism."[14] Therefore, this anti-feminist passage, which reinstates the hierarchies that Anarchism is supposed to eliminate, contradicts the cronista's previous statement assuring that women are equal to men. Reggie Rodríguez claims that this stance may have been influenced by the implicit male chauvinism in Peter Kropotkin's "An Appeal to the Young" ("Ricardo Flores Magón" n.p.).[15] Similarly, in "Progreso revolucionario," published in Regeneración on February 12, 1916, Flores Magón claims that only five years after the beginning of the Mexican Revolution there has already been revolutionary progress for women. Then he reveals that in a conference for women that had taken place in Yucatan, Mexico, it had been

established that women were as intelligent as men and that, for this reason, they deserved to have the same rights. Once again, however, the celebration of this outcome is followed by a condemnation of the fact that Mexican women want to occupy public posts, when, in his opinion, they should be fighting for anarchy.

In contrast, in another crónica titled "Margarita Ortega" and published in Regeneración on June 13, 1914, Flores Magón re-inscribes women as active participants in the Mexican Revolution by eulogizing the life and death of Margarita Ortega, an anarchist woman who was also a member of the Mexican Liberal Party. According to the cronista, Ortega acted as a link for the combatants of the Mexican Liberal Party in Baja California, bringing them dynamite, weaponry, and ammunition. Instead of taking advantage of the security and the easy life that her wealthy family could provide for her, she chose to leave her boyfriend in order to fight, together with her daughter Rosaura, for her ideals. Eventually, the Maderista authorities expelled Margarita and Rosaura Ortega from Mexicali and left them in the desert without food or water. Although they managed to reach Yuma and then Phoenix, Arizona, Rosaura died shortly thereafter and Margarita ended up imprisoned, tortured, and shot by a firing squad in Mexicali.

Strategic Concealment of Anarchism

In line with these anarchist ideals, in "Vamos hacia la vida" (We Move Toward Life), first published in July 1907 in the Los Angeles newspaper Revolución and then reprinted on October 10, 1910 in Regeneración, Flores Magón defines himself not as a utopian but as a realist. Speaking against organized religion, he argues that the days when human beings fought for heaven are long gone; in his view, they now fight for the Earth. Then, he encourages people to rebel: "Blessed be the hearts where protest takes root. Indiscipline and rebelliousness!, beautiful flowers that have not been adequately grown."[16] Curiously, at times Flores Magón chose to hide his true political colors. For instance, in "Carta de la cárcel de Los Angeles" (Letter from the Los Angeles Penitentiary), written on June 13, 1908, Flores Magón justified calling himself a liberal in order to hide the fact that he was truly an anarchist: "If we had called ourselves anarchists from the beginning, no one, other than a few, would have listened to us. […] It all is, therefore, a matter of tactics."[17] In contrast, in "La Junta Organizadora del Partido Liberal Mexicano a los maderistas y a los mexicanos en general" (The Organizing Junta of the Mexican Liberal Party to Maderistas and Mexicans in General), another crónica written in Los Angeles on May 24, 1911 and published in the Los Angeles newspaper Regeneración on May 27, 1911, he warns against the dangers of electing Francisco Madero and then asks Mexicans to support the anarchist views of his party if they want an authentic economic revolution and the free distribution of land. His radicalism lead him, in "Por la patria" (For the Fatherland), to actually encourage all Mexicans to assassinate Victoriano Huerta, Venustiano Carranza, Francisco "Pancho" Villa, and whoever proposes a paternalistic government and speaks of patriotism. This change in political strategy probably prevented him from having a realistic chance of attracting a larger number of followers. "By proclaiming his anarchism," posits Albro, "Flores Magón ruled himself out of future significance in the stormy course of the Mexican Revolution" (99).

Who Is to Blame, the Capital or the People?

The denunciation of the lynching of Mexicans in the United States was one of the most recurrent topics in the early Spanish-language chronicle. Flores Magón addresses this issue in "La repercusión de un linchamiento" (The repercussion of a lynching), published in Regeneración on November 12, 1910. First, he condemns Washington's support of dictators such as the Guatemalan Estrada Cabrera and the Mexican Porfirio Díaz, as well as its intervention in the internal politics of Latin American countries. In contrast with Francisco P. Ramírez, however, Flores Magón does not interpret the situation along racial or ethnic lines. Rather than the North American people, he blames the greedy owners of multinational companies. Yet his rhetoric continues to produce contradictions once he provides examples about the mistreatment and oppression of Mexicans in the United States: "Everyone knows the disdain with which the Mexican race in general is treated, everyone knows that in Texas they treat Mexicans worse than blacks. In hotels, boarding houses, and other public businesses in Texas, they do not admit Mexicans. Public schools close their doors to children of our race."[18] More specifically, he condemns the lynching of a Mexican citizen named Antonio Rodríguez, who was burned alive after being accused (without a court case) of killing a North American woman in Rock Springs, Texas. Again, Flores Magón ends up using the tragedy for his own political propaganda, blaming not the lynching crowd, but Capitalism itself, which, he argues, has divided "the two races that populate this beautiful continent" (meaning Anglos and Latinos).[19]

Flores Magón repeats time and again all these anarchist ideas against Capitalism, international borders, government, authority, false patriotism, private property, and organized religion in different crónicas published in Regeneración. In "Tierra" (Land), for example, he argues that private property originates from crime and violence, and that it is the source of all the evils of humankind. He ends the crónica by encouraging peasants to stop working the land until they own it; meanwhile, he asserts, the best thing to do is to buy weapons in order to fight for the land. This repetition of ideas, however, is sporadically interrupted by surprising contradictions. For instance, at the same time that Flores Magón and his Mexican Liberal Party claim to be part of "the people," in crónicas such as "Sembrando" (Sowing) he laments the "Imbecility and cowardice of the masses."[20] Likewise, in "Para después del triunfo" (For the Aftermath of the Triumph) he states paternalistically: "The people are the eternal boy: credulous, innocent, candid."[21]

Flores Magón and Indigenous People

Flores Magón also uses the example of pre-Columbian societies and their communal property of the land as a model for the Marxist-Anarchist politics he defends. As can be noticed in "Derecho de propiedad" (Property Rights), he sees the arrival of the Spanish conquistadors as the beginning of the present situation of injustice and social inequality. The opprobrium suffered by native peoples is condemned in "En marcha" (On the March), where he describes the deportation of Yaqui Indians from Sonora to Yucatán by Porfirio Díaz in order to sell the land to U.S. companies as an insult to the Mexican nation. Similarly, on September 2, 1911, in another crónica titled "El pueblo mexicano es apto para el comunismo" (Mexican People are Ready for Communism) and published in

Regeneración, Flores Magón goes even further: "Mexico is marching toward Communism at a faster pace than that we, exalted revolutionaries, expected."[22] The reason for this accelerated process, he argues, is that Mexicans have been practicing Communism for centuries. In this context, he explains that before they were robbed of all their possessions twenty years earlier, the four million Indians who lived in Mexico at the moment had been sharing collectively their lands, waters, and forests, with no need for authority. The situation, according to him, was the same for most mestizos in Mexico, who had been working in solidarity and with mutual support.

The Three Enemies of Workers

In another chronicle titled "Regeneración" and published on September 3, 1910, Flores Magón informs readers about his release from prison after having spent three years doing hard labor. Subsequently, he rejects the democratic process and proposes, instead, to join the upcoming revolution, which, in his view, will bring about the liberation of oppressed Mexicans. Four months after the Mexican Revolution had started, Flores Magón, this time along with his brother Enrique, Librado Rivera and Anselmo L. Figueroa, celebrates the prospects of victory in "Manifiesto a todos los trabajadores del mundo" (Manifesto to All the Workers in the World), published in Regeneración, in Los Angeles, on April 3, 1911. At the same time, they criticize another enemy who is in the shadow of the dictator Porfirio Díaz: the "millionaire" Francisco I. Madero, leader of the Anti-re-electionist Party. A new manifesto published in Los Angeles on September 23, 1911 by these four journalists claims that once private property disappears, there will no longer be any need for government or church, which, in their view, are, along with capital, the three main enemies of workers. As representatives of the Mexican Liberal Party, they guarantee that workers will own land, machinery, transportation, and houses.

Persecution of Mexicans in Texas

In "Manifiesto a todos los trabajadores del mundo" the four anarchist cronistas also denounce the killing of two Mexican revolutionaries named Rincón and Lomas in Texas as well as the imprisonment of twelve more, accused of killing a Hispanic sheriff:

> Who among you has never suffered outrage in this country for the mere fact of being Mexican? Who among you has not heard about crimes that are committed daily against our race? Don't you know that in the south of this country Mexicans are not allowed to sit in a diner next to a North American? Haven't you gone into a barber shop where you've been told, looking you up and down, 'We don't serve Mexicans here'? Don't you know that prisons in the United States are full of Mexicans? And have you even counted the number of Mexicans that have been hung in this country or who have been burned by brutal crowds of white people? [23]

Likewise, in "Los levantamientos en Texas" (The Uprisings in Texas), published in Regeneración on October 2, 1915, Flores Magón discusses the skirmishes between Texas Rangers and Mexicans living in Texas, in which, according to him, the latter were just trying to put an end to the constant harassment they suffered. Instead of attacking only the rebels, Flores Magón explains, the Rangers, aided by civilians, persecuted all

Mexican males. Although the rebellion is only a matter of self-defense, he insists, the "bourgeois press" talks about the Plan of San Diego, by which supposedly some people were trying to create an independent country out of the lands the United States took from Mexico. In the end, over five hundred Mexicans were killed.

Gonzalo Aguirre Beltrán has summarized Flores Magón's contributions to the formation of the idea of nationality: "1) that the fatherland is a social invention, 2) that the concept originates and develops along with Capitalism, 3) that the fundamental trait that shapes it is the principle of territoriality and 4) that the irrational character that it often acquires is produced by the cultural conditioning carried out by the leading bourgeoisie of a society that is divided in classes."[24] The fact that Flores Magón was forced to live and publish in the United States probably exacerbated these transnational anarchist views. In any case, as stated above, all these chronicles are proof of both the early involvement of Mexicans and Mexican Americans in U.S. domestic politics and of the influence of Mexicans living north of the border in the developments that ended up exploding in the Mexican Revolution. In all, as Albro points out, "Ricardo Flores Magón and his <u>Partido Liberal Mexicano</u> (PLM) have come to be sanctified in modern Mexico as the primary precursors of the Mexican Revolution of 1910" (XII). These chronicles are also unique within the corpus Mexican and Latino writing in Los Angeles in that ethnicity is left aside in order to combat the chroniclers' collective enemy: Capitalism. Simultaneously, with the disappearance of racial and ethnic barriers, the relevance of international borders fades away, proposing instead an international struggle along class lines. In this sense, Griswold del Castillo states that, in contrast with other Mexican and Chicano newspapers in the Southwest, <u>Regeneración</u> promoted collective struggle across ethnic and national borders: "Magón used <u>Regeneración</u> to publicize rallies and labor conferences in Los Angeles and elsewhere; the constant theme was the alliance of the Mexicans, Chicano and Anglo-American working class. The revolution was an opportunity to unite all oppressed people regardless of national boundaries" ("Mexican" 46).

Journals, however, were not only a vehicle for political propaganda and the denunciation of the oppression of Mexicans, but also a means for fundraising. In fact, as Gómez Quiñones points out, <u>Regeneración</u> was, along with contributions and membership dues, the main source of financial support for the PLM, and a large portion of its readership was located precisely in Los Angeles: "The PLM's major constituencies among mexicanos in the United States were strongest in three major areas: (1) along the Texas border; (2) among the mining areas of Nuevo México, Arizona, and El Paso; and (3) among the large expanding urban and semiurban Mexican population of Los Angeles" (<u>Roots</u> 344). These chronicles published in <u>Regeneración</u> and other PLM-affiliated newspapers were, therefore, powerful economic and organizing tools that disseminated the party's ideological propaganda throughout the United States and Mexico, and united Mexican workers from both sides of the border to struggle for common goals. Ultimately, they represent a transnational and post-national approach to the goal of liberation that appears to be in direct contrast with the openly nationalistic discourse of the Chicano movement some decades later, but in consonance with the latest developments in Chicano and Latino literature written in Los Angeles, including the novels of Graciela Limón and Héctor Tobar, among others. Besides being a historical tool for resistance, the

Spanish-language crónica represents in itself an effort to preserve an important aspect of Latino culture in the United States. Many other Latin American and Latino chroniclers followed in Francisco P. Ramírez's and Ricardo Flores Magón's steps, including the following: Práxedis Guerrero, José Rodríguez, Pastor de Celis, Mariano J. Varela, S.A. Cardona, José Vasconcelos, José Rodríguez, Miguel Arce, Esteban Escalante, Gabriel Navarro, Daniel Venegas (pen name El Malcriado [The Brat]), Julio Arce (pen name Jorge Ulica), Benjamín Padilla (pen names Kaskabel, Rattle Snake, Az. T.K. [The Aztec], and Chicote [The Whip]), Manuel C. Rojo, José E. Gonzales, Octavio Paz, Carlos Monsiváis, and Mario Vargas Llosa. Their chronicle writing and publishing in Los Angeles is yet to be anthologized and studied.

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[1] The Broadway production debuted at the Winter Garden Theater and had forty-one performances. In 1981, a filmed version of the Broadway play, also directed by Luis Valdez, was released. It featured music by Daniel Valdez and Lalo Guerrero, and the cast included Daniel Valdez, Edward James Olmos, and Tyne Daly.

[2] Mike Davis has also criticized the racism of the Los Angeles press in an article covering a Malibu fire: "The Malibu Times [11 November 1993] celebrated the case of two intrepid housewives from the Big Rock area who loaded their dogs into kayaks and took to the sea, where they were eventually rescued by Baywatch Redondo. Only the fine print revealed that, in saving their pets, they had left the Latina maids behind" (Ecology 128).

[3] In their list of Mexican chroniclers, Ignacio Corona and Beth E. Jörgenensen also include Salvador Novo, José Alvarado, Vicente Leñero, José Joaquín Blanco, Cristina Pacheco, Julio Scherer García, and Ricardo Garibay (1-2).

[4] "Fácilmente se desprende del legado de prosas poéticas y reconvenciones moralistas y funde en un solo género crónica, artículo y ensayo" (A ustedes 40). Monsiváis considers Salvador Novo one of the masters of this journalistic genre: "[he] easily gets rid of the legacy of poetic prose and moralist conventions and blends chronicle, article, and essay into one single genre." Novo, continues Monsiváis, resorts to erudition, memorable phrases, neologisms, archaisms, and a disdain for that which is transcendent.

[5] Among other nineteenth-century Spanish-language journals in Los Angeles are the following: Los Angeles Star (1851-1879; half of the paper was printed in Spanish as La Estrella de Los Angeles [1851-1855]), El Clamor Público, Las Dos Repúblicas (1892-1898), El Amigo del Pueblo (1861-1862), La Crónica (1872-1892), El Eco Mexicano (1885), El Monitor (1898), La Reforma (1877-1878), Revista Hispano-Americana (1889-1894), and Revista Latino-Americana (1892-1893). In the twentieth century, other journals would follow, such as El Correo Mexicano (1917), La Opinión (1926-), El Heraldo de México (1915-1918), El Malcriado (1924-29), La Voz de la Justicia, El Eco de la Patria, El Joven (1877-1878), La voz del Nuevo Mundo, Regeneración, La Prensa (1912-1924), and La Gaceta de los Estados Unidos (1917).

[6] The first Spanish-language newspaper of California was San Francisco's La Crónica, which was first published in 1854. By 1900, there were 312 Spanish-language newspapers in California (Trevino 15).

[7] "Pretensión arrogante e insostenible" (n.p.).

[8] "Los Estados Unidos son la Reforma insensata que no habiendo podido triunfar de la civilización latina con el apoyo de Coligny, atravesó los mares para volver con fuerza a luchar contra esa civilización." Gaspard de Coligny (1519-1572) was a French Huguenot general and leader who was massacred on Saint Bartholomew's Day in 1572.

[9] "Sabe muy bien que, una vez empeñada la lucha, su triunfo es seguro, el istmo y la isla su presa y que nada podrá detener su invasora marcha hacia el sud, su vuelo destructor hacia Europa."

[10] "Los chicanos participaron en la revolución mexicana a través de la actividad del PLM, mientras al mismo tiempo tomaban parte en el movimiento radical de Estados Unidos" (Las ideas 14).

[11] The two journals of the Partido Liberal Mexicano (Mexican Liberal Party; PLM) in Los Angeles were Regeneración (September 1910-June 1918) and Libertad y Trabajo (Gómez-Quiñones 49).

[12] "Las reivindicaciones que sugiere a la mujer no se distinguen en lo esencial de las del hombre, ya que son dirigidas hacia la lucha por la emancipación" (n.p.).

[13] "Vuestro deber es ayudar al hombre; estar con él cuando vacila, para animarlo; volar a su lado cuando sufre para endulzar su pena y reír y cantar con él cuando el triunfo sonríe. ¿Que no entendéis de política? No es ésta una cuestión de política: es una cuestión de vida o muerte" (n.p.).

[14] "No está educada como el hombre para la guerra industrial, no está organizada con las de su clase para luchar con sus hermanos los trabajadores contra la rapacidad del capital" (n.p.).

[15] In fact, Flores Magón was not the only chronicler to follow this line of thought. Another member of the PLM and a journalist for Regeneración, Práxedis Guerrero, had previously dealt with the topic of the emancipation of women in a chronicle entitled "Mujer" (Woman), which was published in Punto Rojo in 1909. There, Guerrero anchors the beginning of the discrimination of women in the Bible and in the Jewish tradition. Subsequently, he praises the freedoms women enjoyed in ancient Egypt, Madagascar and among the Bedouins, and then contrasts them with the oppression suffered in India, China, and ancient Greece. Paradoxically, after this promising introduction, he proceeds to attack the feminist movement.

[16] "Bienaventurados los corazones donde enraíza la protesta. ¡Indisciplina y rebeldía!, bellas flores que no han sido debidamente cultivadas" (<u>Ricardo</u> 8).

[17] "Si desde un principio nos hubiéramos llamado anarquistas, nadie, a no ser unos cuantos, nos habría escuchado. [….] Todo es, pues, cuestión de táctica" (Gómez Quiñones 115).

[18] "Todos saben con qué desprecio se trata a la raza Mexicana en general, todos saben que en Texas se trata a los mexicanos de manera peor que a los negros. En los hoteles, fondas y otros establecimientos públicos de Texas, no se admite al mexicano. Las escuelas oficiales cierran sus puertas a los niños de nuestra raza" (138).

[19] "Las dos razas pobladoras de este hermoso continente" (138). In the chronicle "Blancos, blancos" (Whites, whites), published in November, 1910, his peer, Práxedis Guerrero, also condemns the burning of Antonio Rodríguez. With the same sarcastic tone used by Flores Magón, Guerrero states: "They were the descendents of Washington, Lincoln, and Franklin; it was a crowd that was well dressed, educated, proud of their virtues, civilized; they were citizens, white 'men' of the United States." ("Fueron descendientes de Washington, de Lincoln, de Franklin; fue una muchedumbre bien vestida, educada, orgullosa de sus virtudes, civilizada; fueron ciudadanos y 'hombres' blancos de Estados Unidos" [136]).

[20] "Imbecilidad o cobardía de las masas" (<u>Ricardo</u> 19).

[21] "El pueblo es el eterno niño: crédulo, inocente, candoroso" (<u>Ricardo</u> 30).

[22] "México marcha hacia el comunismo más aprisa de lo que esperábamos los exaltados revolucionarios" (146).

[23] "¿Quién de vosotros no ha recibido un ultraje en este país, por el solo hecho de ser mexicano? ¿Quién de vosotros no ha oído relatar los crímenes que a diario se cometen en personas de nuestra raza? ¿No sabéis que en el sur de este país no se permite que el mexicano se siente, en la fonda, al lado del norteamericano? ¿No habéis entrado a una barbería donde se os ha dicho, mirándoos de arriba a abajo: 'aquí no se sirve a mexicanos'? ¿No sabéis que los presidios de Estados Unidos están llenos de mexicanos? ¿Y habéis contado, siquiera, el número de mexicanos que han subido a la horca en este país o han perecido quemados por brutales multitudes de gente blanca?" (165).

[24] "1) que la patria es una invención social, 2) que el concepto insurge y se desarrolla con el capitalismo, 3) que el rasgo fundamental que lo compone es el principio de la territorialidad y 4) que el carácter irracional que a menudo adquiere es producido por el condicionamiento cultural puesto en obra por la burguesía dirigente de una sociedad dividida en clases" (XLIV).

Colombian television: Changes, Offers and Young Audiences' Response

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Abstract

The incidence of subscription television in Colombia has found a preferential audience in teenagers, especially for thematic offers which have begun to threaten the traditional hegemony held by national private channels. The main purpose of the first phase of the research is to find out the consumption habits and preferences of teenagers, in an environment with excess television supply. The first analysis of the data collected is herein gathered to address these issues.

Colombian television: changes, offers and young audiences' response

Introduction

The Colombian television industry has experienced major changes and innovations in the last twelve years. From its inception in 1954 and for over four decades, the television offer was based on two public channels operated by private producers and, since 1970, on a third public television channel, stately owned and operated (nowadays Señal Colombia) with a varied informational, educational and entertainment programming. During this period, some local frequencies tried to establish themselves but they did not last for long.

In 1995, when the National Television Commission (CNTV)) began to operate, the country's television access included only three official channels, two of which had a commercial bearing, five regional channels and nine cable operators legally acknowledged.

According to the official registry of CNTV, by December, 2006, the offer included two private channels with national broadcasting coverage, one official national channel broadcasted by private producers, two national channels programmed with state-produced contents, one local private television channel for Bogotá, eight regional public channels, 41 local non-profit channels (7 of which are operated by universities), 69 cable operators, three satellite television companies, 106 channels operated by local communities and 767 distributors of incidental broadcasting signal.

In twelve years, the growth in TV channels and frequencies in Colombia has led to a larger offer of TV programming output, which has been considerably increased, among other factors, because of the spread of subscription-based television. According to the calculations of the office for planning of the administrative and financial subdivision of the CNTV, in 2000 842.538 households had some sort of subscription television (cable or satellite). By June 2006 this number had gone up to 1'409, 384 users of said service. Now, one year later, CNTV has put out the number of subscribers to this kind of television at 1.78 million.

The continuous home survey –ECH- carried out by the National Statistics Department (DANE) (Department for National Statistics) on the third trimester on 2005 included a module dedicated to television. Up until now it has been the most representative survey of that cluster, covering 16 cities, and with a sample of 126,152 people from 32,485 homes, considering a universe of 20'550,674 people. According to that study, from 5'138.474 homes, 43,3% received Television broadcasting through subscription, whereas 48,1% were receiving the broadcast through aerials.

The General Media Study (EGM) from the first semester of 2007, undertaken by the Colombian Association for Media Studies (ACIM)), estimated the scope of closed television (subscription-dependent) reached 71,5% of homes, making Cali the urban centre with the highest coverage, around 90,2%, and Villavicencio as the lowest, with 35,3%. The EGM 2007-I confirmed equally, among youth and teenagers, the level of preference for programming topics related to sports, entertainment and films.

Among the main results of the survey –ECH- applied by DANE in 2005 there is an evidence of the fragmentation phenomenon in terms of preferences for the consumption of television products. Although the conglomerate of the national private channels (RCN and Caracol) still hold on to the highest viewer ratings, confirmed by the daily rating reports issued by the firm Ibope, the entry of the remaining offers is evident in both the local and regional fields, especially outside of Bogota, and even more so in the case of the demand for programming related to international themed channels, offered through subscription television, which are now a considerable option for the Colombian viewers, especially among youth, teenagers and children.

Main focus of the study

In this complex scenario of current offer and demand, finding out the interests, habits, routines and preferences of TV consumption by the general audience, and by the specific audience of youth and teenagers, becomes a useful tool to determine tendencies in the behavior of consumers of the Colombian audiovisual market, bearing in mind also the growth that this sector still holds for the country and the next entrance of the third national private channel and new technologies of broadcasting and telecommunication in near future.

The research, whose first stage results are presented in this article, becomes a linking point between the strictly commercial studies system, which priories quantitative indexes and consumers profiles in order to measure and ensure audiences for programs and commercial spots, and those studies concerned with audiovisual format and genre analysis, which aim at measuring the effects that contents may have on the public.

In eighties, Humberto Eco remarked the transition from paleotelevision to neotelevision, when color, privatization, commercialization, genre hybridism and new formats transformed the traditional concept of a black and white TV, monopolized, predominantly public service in Europe, and with an audience characterized by their passivity facing contents. Today Eco's classification ends up short in front of the challenges of what Ignacio Ramonet deems 'post-televisión', characterized by the interaction between the worlds of interactive and multimedia convergence at a global scale, whose effects upon individuals and societies claim a permanent revision and study.

In this environment it becomes important to determine the consumer habits and preferences facing recent years' developments in matters such as television diffusion, telecommunications and new information and communication technologies, which build a profile quite distinct from that of the traditional viewer. How can we create the profile of what Omar Rincón (2007) calls "*hipervidentes*"? What are their responses and expectations for access to today's technologies on offer, and to the changes they promise for tomorrow's developments? One of such changes is digital television, which would completely modify the relationship between the medium and the consumer.

In this scenario, young people and teenagers become an interesting target for analysis, because of their easy adaptability and their quick response to changes, because of their constant desire of exploration, classification and siftings of the medium, and because they are the adult consumers of tomorrow, and those who would guide their children in establishing criteria for television consumption, along the lines of an environment of convergence and multiple changes and innovation.

Research methodology

The main goal of the first step of the research is to determine the consumption habits and establish the content preferences and carry out a qualitative comparison between the Colombian and international television offers, following the opinions and concepts poised by the teenagers between 12 and 17 years-old, from all economical income levels, who live and study in Bogota, the Colombian capitol.

To attain this goal, a mixed methodological approach was applied, living priority to a qualitative order and with a descriptive typology. Some questions, especially those about consumption habits and preferences were interpreted, based on their nature, in a quantitative way, in order to determine some trends and to create comparisons.

The research applies a mixed methodology in a concurrent order, from a dominant status, where the qualitative aspects become more relevant than the quantitative ones, according to the classification of the mixed methods by Jonson and Onwuegbuzie (2004).

The focus of the research relies on a qualitative interpretation of opinion variables that were brought up by the teenagers participating in the focus groups. The procedures employed for the construction of questions and their interpretation deal with the methodological perspective applied in social sciences.

The sampling and screening strategy applied is from a non-probabilistic kind. The population surveyed in this stage of the research does not constitute a representative sample of the universe of students in Bogota. The educational centers for the survey were chosen based on two essential conditions: how representative their economical level is, and their location around the city. The sample's selection was supported by the official classification of secondary schools made by the City's Educational Secretary (SED). On a second level, a coverage of both public and private institutions was ensured.

To achieve the goals of the study, two research techniques were undertaken: a guided survey, in which the researchers made sure the sense and aim of each question was clear for those surveyed. Groups of 20 to 30 students were selected randomly between the sixth and eleventh grades of secondary. The list of the schools in this coverage is given here:

SCHOOL	LOCATION	TYPE	ECONOMICAL INCOME LEVEL
Sierra Morena	Ciudad Bolívar	Public	Very low
INEM Santiago Pérez	Tunjuelito	Public	Low
Jorge Eliécer Gaitán	Barrios Unidos	Public	Low
San Pedro Claver	Fontibón	Religious	Medium
Simón Rodríguez	Chapinero	Public	Medium
Bethlemitas	Chapinero Alto	Private	High
Nuevo Gimnasio	Chicó	Private	Very high

Focus groups were carried out on a second step. First, their members answered the guided survey and then, animated by the topic of the research, accepted the invitation to participate in a dialogue with the researchers. Students of both genders, aged 12 to 17, participated in the research. All

of their answers were recorded by a video camera, with the previous consent of the students and the school.

The study was done on a transversal way. The surveys and the focus groups were done during July, August and September, 2007. These are, according to Ibope Colombia, the months of the year in which television consumption hits its highest average of hours per day. The total of participants was 488 students, of which 34 were taken out of the survey due to inconsistency or incoherence in their responses. Keeping up a coherent with the population density and their economic income stratification in the city, the following coverage of the selected sample was made:

|				
Strata	1 and 2	154	Men	191
	3 and 4	247	Women	263
	5 and 6	53	TOTAL	454

Research results

The first part of the results aimed at corroborating the indexes analyzed in previous studies concerned with the market intake of paid television broadcasting. Consequently with other results, 82% of the students mentioned they had access to subscription television (either cable or satellite), while 35% of those who replied negatively mentioned, however, among their preferences, international offers in programming and channels. The possibility of access to this kind of television is given by consumption of television in different places than home, like a relative's or a friend's home. Notwithstanding, the home remains the favorite place to watch television, with a good 95% of the answers.

During the week, the heaviest teenage television consumption time spot is found in the evening (from 7 to 10.30 p.m.), followed by the late afternoon and the morning. Between 2 and 3 hours on average is the weekly consumption of television, and this matches the 2 hours and 53 minutes of daily average television consumption estimated by Ibope in May, 2007. (See figure 1).
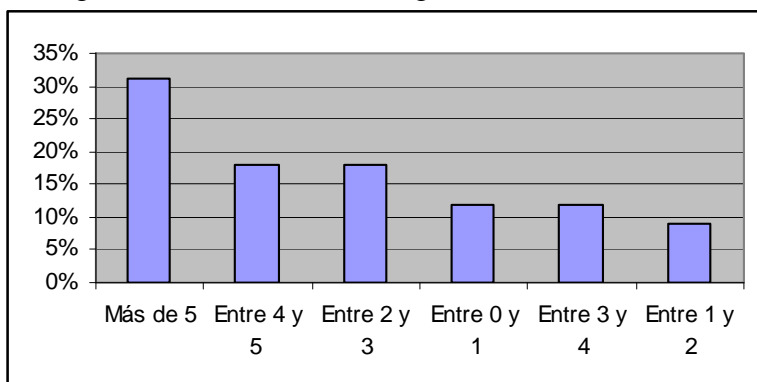
(Figure 1)
Average of time (hours) watching TV weekly
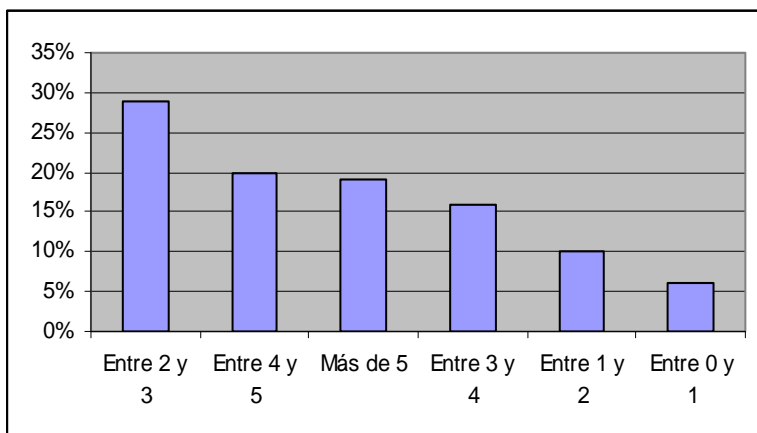
On the weekend, the preference for evening-time television remains, and the average hours of consumption increase to over five hours a day. (See figure 2).
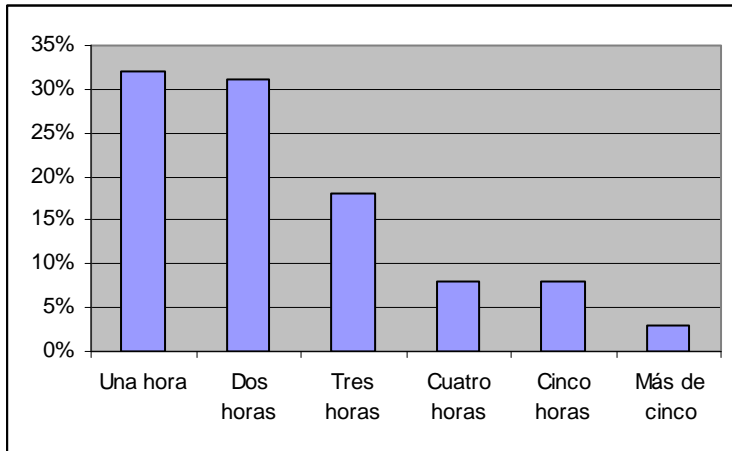
(Figure 2)
Average of time (hours) watching TV on weekends

Those surveyed were also asked about the amount of time they spent watching national and international television. During the week, as well as on the weekend, there is a higher consumption of television offers from subscription TV, and this index is confirmed later, when their preferences for both channels and programs are contrasted later on. (See figures 3, 4, 5 and 6)
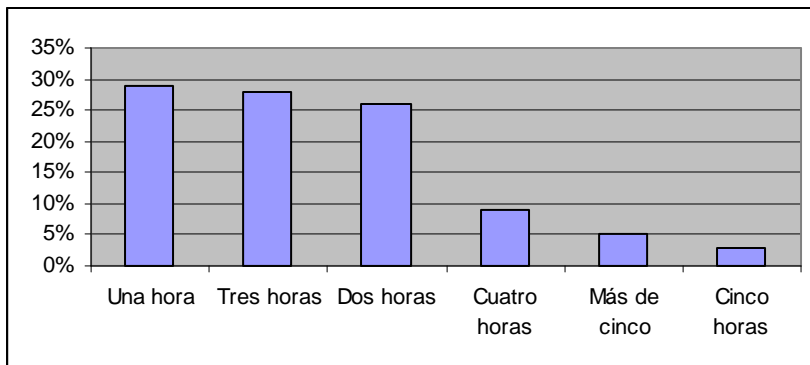
(Figure 3)
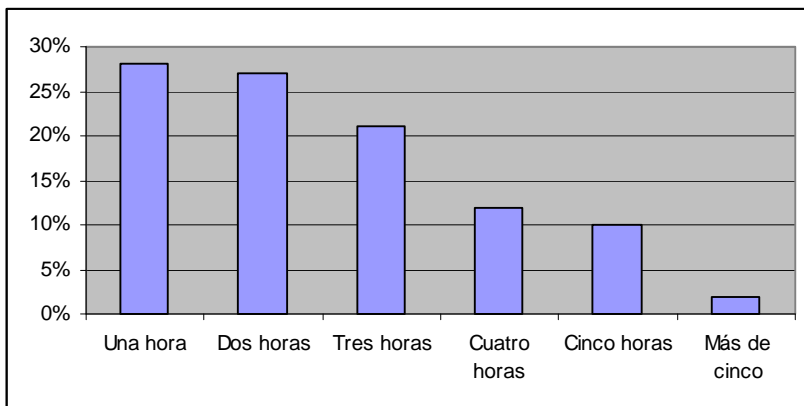From the average weekly, how much time do you watch Colombian TV?

(Figure 4)
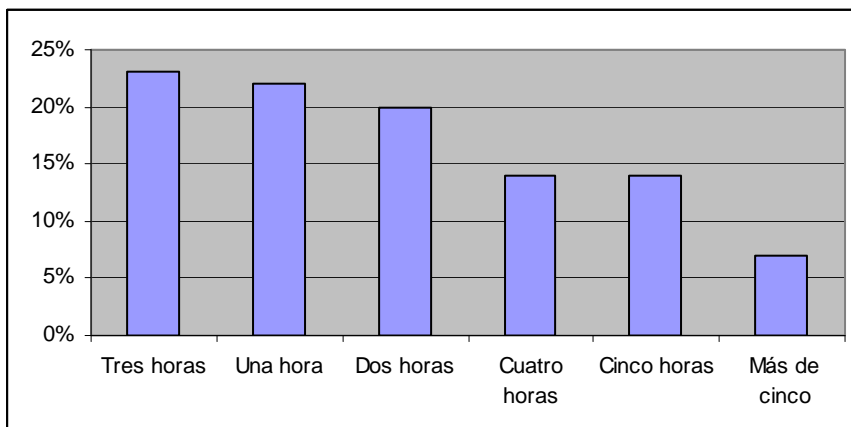From the average weekly, how much time do you watch International TV?

(Figure 5)
From the average on weekends, how much time do you watch national TV?

(Figure 6)
From the average on weekends, how much time do you watch international TV?

Consumption preferences

In the consolidated results, 71% of the students surveyed chose entertainment as the first option in content choice, ahead of a 29% that prefers informative content. Taking the model proposed by Gustavo Orza (2002) as a reference for classifying television programs, which takes into account the content, textual and enunciative analysis, and that allows for a distinction between real and fictional discourses, the following preference program classification is made, according to the information category (referential television) and the fiction and entertainment category (non-referential television). (See figures 7 and 8)
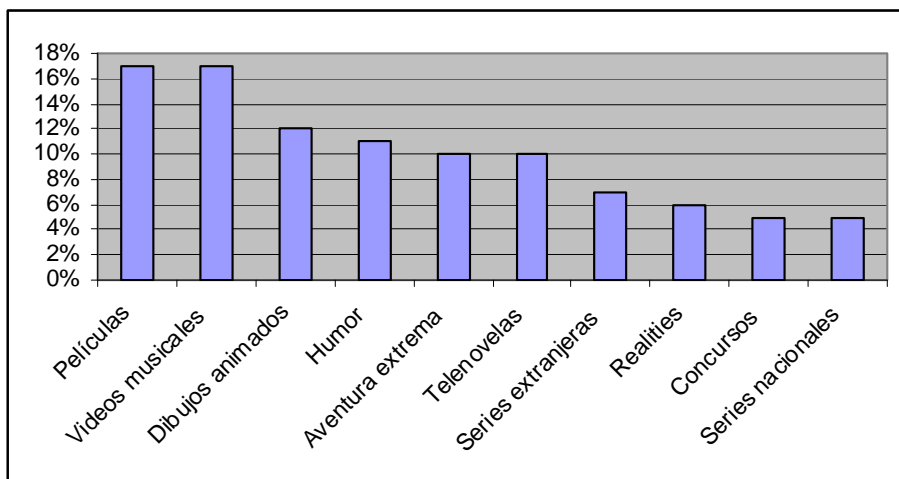
(Figure 7)
Preferences of adolescents surveyed on informative television
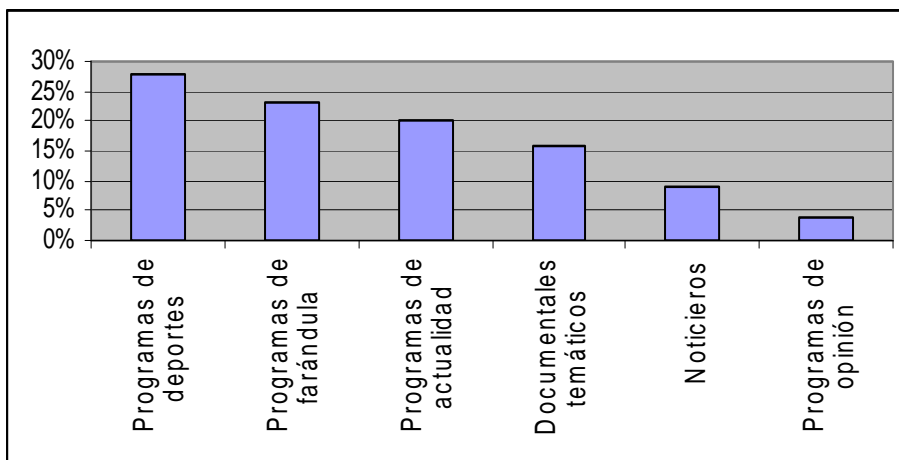
(Figure 8)
Preferences of adolescents surveyed on entertainment television

In regards to information television, among the lowest preference were news broadcasts and talked shows. It seems worthy to quote some of the comments made by the students in the focus groups:

"Newscasts are important for everybody, but they are very sensationalists, very superficial, and that's no quality"

"In the news, the information given is just from the surface (sic), very short… it's precise, but doesn't have much depth"

"The best shows are broadcast when no one can match them. The talk shows come between 10 p.m. and midnight and very few people watch them".

In the TV shows about sports, celebrities and current affaires, which are their favorites, the students remarked on the quality of the production, the coverage and the depth of the research. In these genres there is a clear evidence of the influence they have from international channel broadcast. Some comments were:

"There are international channels that take figures which have made history. Documentaries like the one on Osama Bin Laden… Those programs grab the audience".

"The kind of documentaries shown on Señal Colombia is very monotonous, for a young person they need more didactic resources, so that one can understand better and not just a person talking all the time and showing images. That is monotonous and doesn't raise interest".

Regarding their preference on non-referential television (fiction and entertainment), the low acceptance of the reality show format is remarkable, compared with the results of similar studies carried out when this kind of programs had taken an important section on the Colombian television prime time. None of the participating students in the focus groups highlighted positive aspects of the format. Some comments are relevant for their critical approach:

"The realities [reality shows] take advantage of people's ingenuity, of their dreams"… "The realities [reality shows] have a double moral"… "They use people to attain rating"… "They hurt the feelings of people, and look for people with low self-esteem".

Favorite programs and channels

One of the goals of the research is to determine which are the favorite TV programs and channels among the surveyed teenagers, bearing in mind the whole television offer they have access to. They were asked about their five preferences in each of the categories (information and entertainment), with the aim of corroborating the audience fragmentation phenomenon, in a television environment with a saturated offer.

In the question about favorite shows, a total of 142 names received a certain degree of favorability among the public, whereas in the question about the five favorite channels, 52 of them made up the list of preferred answers. The questions were also made to those students who had no subscription television access at home.

Regarding TV show preference, the first 16 program contents are fiction and entertainment, whereas the first informative (referential) type of program is the broadcast of a professional Colombian National Soccer League on the 17th place, followed by the hybrid formats of Extreme Animals of Animal Planet, and the special shows on Discovery Channel or Miami Ink from People and Arts. Among the first 20 programs, the only Colombian productions are the soap operas, while the Simpsons holds the first place and is seen on two different channels: Caracol and FOX. The results do corroborate the result of 55% of those surveyed who preferred international television. (See figure 9)

(Figure 9)
Their favorite 10 shows and what channel broadcast them
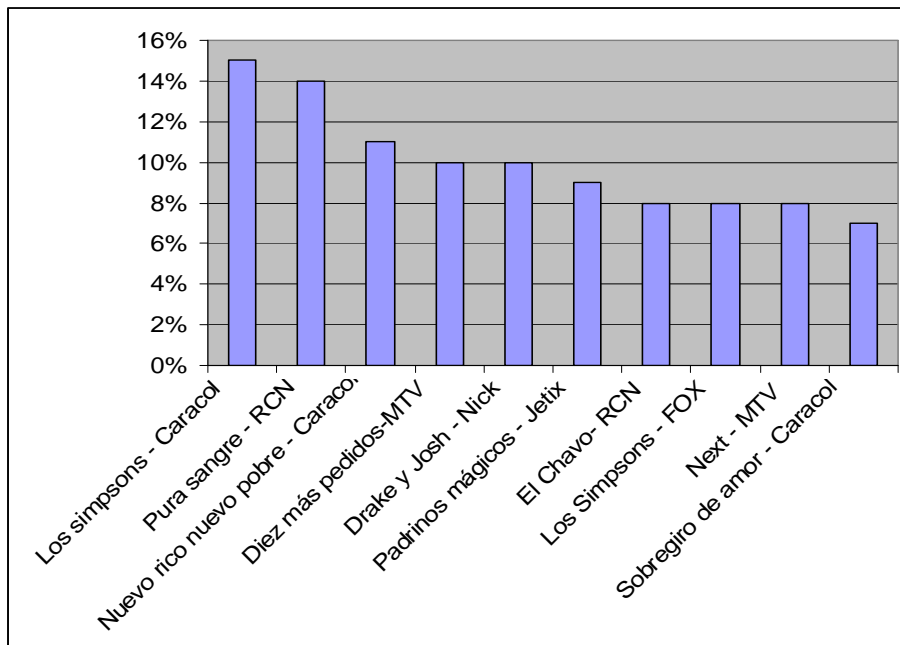
In the channel preference, the private Caracol and RCN are the only national channels of varied programs which are among the 14 more mentioned. City TV (broadcasted from Bogotá) holds spot number 15. The sixth spot, given by the students to the thematic Channel 'Canal 13', which bases its contents on music videos and youth and teenage-related interest shows. The coverage of subscription channels becomes evident in the answers. Only five Colombian channels, Caracol (1°), RCN (5°), Canal 13 (6°), City TV (15°) and Señal Colombia (18°) are among the 20 most preferred.. The result matches those of the 63% surveyed who mentioned they rather match international channels. (See figure 10)

(Figure 10)
Their favorite 10 channels
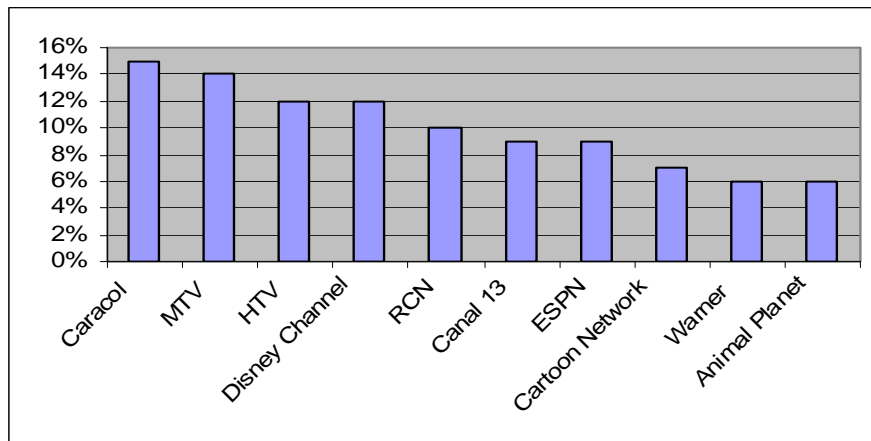
Quality and originality of the Colombian production

55% of the students considered that Colombian television has a good quality when compared with the international offer. One of the main objectives of the use of focus groups was to get to know teenage criteria for quality. Here are some of the answers which contextualize those who agree that Colombian television has a good standard of quality:

"The quality of Colombian TV is not better than the international [television], but it is interesting for Colombians, especially in soap operas, some are entertaining and fun to match."
"Colombian television has good quality because it represents us. Entertainment-wise they broadcast soap operas, humor, and informative shows which keep track of what goes on in the news shows."
"I highlight soap opera especially, they are good, in terms of topic, and because the actors are good and they have drama, suspense and action".

When asked about the originality and variety of the programs, criticisms was brought up in the focus groups for the Colombian channels, especially private ones, without complaints to the quality of production. Some comments that summarize the students' perspectives are:

"The problem with Colombian television is that sometimes it is too boring because they only show soap operas and they are always the same, the same things happen, there is nothing new. Besides, there is also a lot of repetition of shows and the soap operas change their schedule."
"The society evolves and we pretend to be equal to other countries, because we match a reality show in a different country and we find it appealing. But to do the same in a Colombian channel would seem absurd to us. Because we saw it somewhere else, and it worked there, like the reality show about the workers, The Apprentice, they wanted to do it here but it wasn't really the same."
"In the afternoon they only show foreign soap operas, most of them from Mexico. In Colombia we know how to praise foreign things, but we don't praise the good Colombian things."
"In the afternoons RCN and Caracol do not show cartoons, and it is at that time that kids arrive from school, and that's why they like international channels."
"What happens is that moms watch soap operas and they have an influence upon what you watch, that is why one ends up hooked into the soap opera, or those who have no cable TV have to watch it. In Caracol and RCN there is much parental influence… One ends up getting involved with the story."
"For my mom it is her soap operas and her cooking shows, my dad chooses his news broadcast and his soap operas. But my brothers and I watch channels dedicated to children and teenagers, because they have more varied programming like music channels and to watch some other stuff."
"They always show the same soap opera, the same reality [show] and one wants to watch something different. Some programs have to do with one's life, but they are few. The international channels think more about teenagers. The channels are afraid to experiment on something new. But they should invent without copying, but the problem is they are afraid of being rejected."
"Some soap operas are good, but those in the afternoon are awful, they should show more programs that leave something, like *Francisco el Matemático*, for instance, only showed one part of society. Now they prefer to show evilness (sic); the lover, the husband, the evil person. They should change that. At the end it is always the same."
"National channels are repeating a lot of what is shown on the international ones. We want more original programming and not programs imported from other countries which do not relate to us."
"The problem is that soap operas are based on one idea. They do not innovate. One already knows what the end of the soap opera is as soon as it starts."
"The channels do not know how to distribute the slots for their shows. There are shows at 9pm which announce they are for people over 18, but then around eleven at night they have shows for those over 12. It is a weird mix."

"In Colombian television there are no ideas like those in [the] Discovery [channel], here there are only soap operas and really absurd things that do not appeal to kids. There should be more children's programming, because they spend their time watching cartoons."

Behind identity and usefulness

71% of the students surveyed considered that Colombian television portrays a national identity. In the focus groups they were inquired further about the concept of national identity and the usefulness that the programs have as a depiction of the reality of those surveyed. Here are some of their reflections:

"There are programs like 'padres e hijos' which help us understand things as they are, for example."
"'Canal 13' produces, for instance, shows dedicated to Colombian talent, made by Colombians, a like them a lot."
"A show like 'Sábados Felices' is attractive, they try for the jokes to be funny, to be different, and that depicts Colombians, it depicts their audience."
"Colombian television has its bad and good sides. The good ones are more, like City TV with 'mujeres en línea' or 'el ABC del bebé', which teach people how to treat their babies properly or teach women how to succeed in life."

Finally, there were questions in the focus groups about the usefulness that Colombian television has for teenagers, compared with the messages of subscription television; the intake of these messages by the audience and the way they interpret television from a formative vision which contributes to their personal, affective and intellectual development. Some of the comments were:

"I stopped living national television. One grows up and realizes that television is not how they picture it. What bugs me are the realities and the soap operas that are prototypes of fake people, but the human being has more to give and exploit."

"Television reaches a lot of people, but in the private channels there is nothing with which you can grow as a person… It is true that there are more channels in Colombia, but one doesn't watch them because they are boring, monotonous, that if they'll talk about flora and fauna, well, people are not going to zap off their reality show… there needs to be more publicity (advertisement) of the other channels, for people to want to watch them."

"Colombian television should look for more things for teenagers, more than just soap operas and music videos. Something that really allows you to express yourself. International television is more cultural, more research-based, more about learning, I, for instance, love the medicine programs at Discovery Home and Health".

"Within the national channels, young people don't find the common sense and the enjoyment they find on foreign channels. Canal 13 has a show, 'El Cuaderno', but it is not enough to get us interested."

"I also think that programs do not give enough education for us and not only that but we don't realize it, but we want to be like the characters in the soap operas or in the cartoons. Now all the kids want to be like Goku, o they want to be Bart Simpson, o they want to be the evil person in the store, and most of the time not only do the shows leave us very little content, we do not help ourselves to ensure they leave something educational for us."

"Colombian television has been overly concerned with acquiring audience and has not been concerned with the viewer, because it is only looking for ways to make money, with soap operas and the like…The negative messages abound in soap operas, they incite to more violence with only a good message at the end, but the rest of what people saw included how people fought each other, how badly they hurt each other, how they treated one another, the bad staff will remain far longer in people's memories than the good stuff."

This was the only question in which there was a specific criterion of the students from the upper socio-economic strata, for whom commercial Colombian television designs strategies solely aimed at the popular sectors.

"Consumption depends on the social strata. A lot of the people from the 'hood always talk about last night's soap opera, or about the reality show, or about the person who was naked. They don't have a

valid concept of culture to watch television. The private television channels aim at luring the masses, fill up squares, towns, shopping malls, just to win a prize."

"Or there are television shows where they go to a house, and the television set must be tuned in the proper TV channel and they get a prize… they always go to neighborhoods, the weirdest ones…"

"Or prank TV shows like 'también caerás'... I don't think they come to make fun of you, to put you on TV, and you agree with that. They look for those people and go to working-class shopping malls, they don't stage their programs over here (in the northern part of town) …"

Conclusions

The incidence of subscription television among teenager school students in Bogotá is not only evident in quantitative terms. It exerts a great deal of influence on them in determining quality patters and leads them to having higher consumption expectations more favorable to other topics and demographic target groups.

Even though Caracol and RCN hold privileged spots among the preferred channels for teenage viewers in Bogota, it is clear that they no longer hold a monopoly of the ratings which they still keep with viewers from older ages, or from regions where access to other TV offers remains limited. 67% of the surveyed students considered that in the near future (3 to 5 years) they will be watching even more international television.

The audience fragmentation phenomenon becomes evident throughout this research. The great ratings in a reduced offer has switched to a whole spectrum of possibilities, where the least catered are those related to programs and focuses which attract a specific audience, such as teenagers.

Soap operas are the Colombian-made genre with the highest top of mind, preference and consideration among adolescents. Regardless of the criticism, observations and recommendations, they hold a place as a reference for quality, variety and narrative richness.

Certainly there is a set of criteria regarding television consumption among teenagers in Bogota. They demand quality on the grounds of concepts adjusted to the inner dynamics of the medium. Regardless of social or economic stance, they expect television to have a feedback which matches their needs and expectations. They will be the adult consumers of tomorrow. New great challenges face television, which remains being produced and broadcast in Colombia under traditional parameters, marketwise as well as narrative-wise, and in the construction of programming grids. The challenge is even bigger now that the standards for a digital television are coming up, and the imminent creation of at least one new private channel with national coverage is on its way.

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Attitudinal Changes toward Electronic News Consumption by the U.S. Hispanic Audience

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From the moment in 1961 that a UHF station in San Antonio, Texas went "hot" as the first Univision affiliate in the United States, Spanish-language media has been on the move. KWEX was the first commercial Spanish-language television station in this country and is still part of the Univision network as an owned and operated (O&O) station (Univision). Since then, Spanish-language media as a whole has been on the fast track developing multiple national networks, a significant cable presence, local television affiliations and commanding an increasing share of the lucrative electronic media advertising market. That economic growth is tied to the increasing Hispanic audience, one that the television industry cannot ignore whether it is Spanish or English-language oriented. Further, as the Spanish-language media has matured its focus has broadened.

Along with entertainment and sport, Spanish language news at the national and local levels has now become not just a part of the U.S. television news landscape but ratings winners in some parts of the nation. But it is the fundamental difference between entertainment programming and, in particular, local television news that makes this development a critical topic for study. While entertainment is important to an individual's well-being, local news can be crucial in alerting or educating a community to issues such as education and government, threats such as severe weather or health matters, and opportunities which may include new economic or housing growth.

Beyond serving the local audience, local news is important to the Spanish-language television station itself. It is the "face" of the station due to local on-air talent and it is the most common way in which the station contributes as a "good citizen" in the community through investigative reporting, special projects, and other service efforts. For all television stations, the issue of news, especially local news, becomes a part of long-term growth and perhaps eventual economic and community survival. But it poses some different options for Spanish-language media.

Research Questions

This paper will consider two questions.

RQ#1: What is the general role of news, especially at the local level, in the overall content considerations of Spanish-language television?

RQ#2: As the Hispanic population in the United States continues to grow, the majority of this audience is already native-born rather than having immigrated. That fact alone suggests the English will have a greater role in the lives of this

viewership. What potential impact could this have on local news as it is delivered on Spanish-language and English-language stations?

A National Spanish-language Media Presence

From its inception, Spanish-language media has been "local", beginning not as a regional or national network but as individual stations serving a segment of their community. Today local stations are part of a much greater media force.

Univision and Telemundo are the leaders in the field. As networks, Univision has 18 full power and 8 low power O & O's with 66 broadcast affiliates and many cable outlet associations, providing coverage to essentially 100% of the U.S. Hispanic market. (Univision). Its sister network, Telefutura is comprised of 18 full power and 15 low power O & O's with 34 broadcast affiliates and a number of cable associations. Univision controls 15 duopolies, coupled with Telefutura in the group. Telemundo, the other significant network is represented in 142 markets and provides coverage to 93% of Hispanic TV households. It owns 15 full power and 9 low power stations in the United States with 36 broadcast affiliates and many cable associations (Telemundo).

However, the change in the Spanish-language media landscape during the past ten years has been dramatic as multiple new players – many which are originally English-language media providers – have rushed to tap the growing Hispanic audience and advertising base.   Examples at the national level of English media involvement include CNN en Espanol, ESPN Deportes, Discovery en Espanol, Disney Latino and MTV's MTV Tr3s.

For the Spanish-language media, the scramble to expand coverage has been even more energetic. In addition to continuing expansion efforts in television, radio, and the Internet by Univision (and TeleFutura) and Telemundo, the member list of Spanish-language media in the United States continues to grow. Examples include Galavision, a long-established cable network; Azteca America; Telenoticias; LAT TV™ (LatinAmerica Broadcasting, Inc.), which debuted in the U.S. in Houston in May of 2006; and TuVision. This latest Spanish-language network entry is owned by Pappas Broadcasting and launched in the fall of 2007 (Hispanic Television Update, October 4, 2007). Still other changes are developing as new players take advantage of technological distribution to expand their reach into the Hispanic market.

Mega TV, a Miami-based O&O of the Spanish Broadcasting System launched nation-wide in October of 2007 on DirectTV Mas. By using the DirecTV Hispanic platform, the network gained access to over 1.5 million new homes. According to Cynthia Hudson Fernandez, SBS executive vice-president, this is the first move toward becoming a "full-fledged Spanish-language network…(and creating) and alternative to Univision and Telemundo" (Hispanic Television Update, October 17, 2007). Not to be outdone, EchoStar Dish Latino also debuted a new channel in October of 2007. TeleFormula is a 24-hour Spanish-language channel that includes entertainment but also breaking news, news commentary, financial, and sporting news (Hispanic Television Update, October 17, 2007).

Audience Ratings and Economic Growth

Two conjoined elements drive this explosion of media entering the Spanish-language arena – audience growth and its associated economic power. The television industry depends on ratings as its economic barometer. The expanding media options available in the United States make claiming a sufficiently large enough piece of the audience advertising revenue increasingly difficult.

One clear advantage at the moment for Spanish-language media is the simple increase in that target audience. According to the United States Census, the median age for the Hispanic population in 2006 was 27.4 years compared to 36.4 years for the total population. Further more, nearly 27% of the Hispanic population is between 20 and 35 years of age, a large part of the key television advertising demographic of 25-49 (U.S. Census, Facts for features). Two more census statistics drive home the growing power of the potential Hispanic audience: Just over 60% of the Hispanic population in the United States is now native born and the government is predicting the Hispanic population will equal just over 24% of the total population by 2050 (U.S. Census Bureau, Current Population Survey).

With more than 150 O&O stations and affiliates between just Univision and Telemundo (pg.2), Spanish-language media now blankets the United States. The power of the local stations tends to be concentrated in the top five television markets. 40% of the U.S. Hispanic viewing audience lives in Los Angeles, New York, Miami-Ft. Lauderdale, Houston, and Chicago (the Dallas-Ft. Worth market is number 6 in this list although ranks 5th in Nielsen's DMA- Designated Market Area). In all, 75% of all Hispanic TV households live in 25 markets (Market Track, Appendix A).

Population growth translates into economic power. One major research and marketing firm, Kagan Research, is predicting that advertising revenues for Hispanic radio and television will outpace the general media market and will reach $5.5 billion by the year 2010 (BroadcastEngineering). Local television stations with major Hispanic network affiliations have had significant financial success in the past five years. According to BIA Financial Network, many of these stations recorded advertising revenue increases of over 56% (Project for Excellence in Journalism, Hispanic media & news). In the first three quarters of 2006, television advertising on Spanish-language media grew 19% on a year-to-year basis according to TNS Media Intelligence (Downey).

The potential impact of that kind of economic and audience strength is being felt by Spanish-language media both at the local and national levels. The addition of Spanish-language stations in markets where there is a growing Hispanic audience means that the programming must now service the local community whose advertising dollars support that station. The result is a new generation of Spanish-language newscasts as part of the service and programming commitment.

News: Developing Markets

News has been a mainstay of local television since its beginning. Now it may be of even greater importance. According to a major research study by the Pew Hispanic

Center, "Getting the news could be the single most extensive cross-cultural experience for the Hispanic population in America" (Pew Hispanic Center, 2004). As Spanish-language media expands beyond the top tier Hispanic household markets, local newscasts have made their way into the program line-up of markets across the nation.

While perhaps not initially considered a major center for Hispanic television viewers, Atlanta, Georgia saw the debut of Georgia TeVe in July of 2005, joining the already established Univision affiliate in the market. Georgia TeVe partners with WAGA/Fox 5 and airs a local evening newscast (Atlanta Daybook).

An August 2007 launch date was set for the Hispanic News Network out of Davenport, Iowa. This is expected to be a 24-hour Spanish-language news network and is still working on carriage agreements but says its goal is to compete directly against CNN en Espanol (Hispanic Television News Update, June 20, 2007).

Already up and running with Spanish-language newscasts in several markets is Equity Media Holdings. They are running their operations using a "hub" system. The main newscast rolls from the control room in Little Rock, Arkansas but feeds news to their Spanish-language stations in Ft. Meyers, Detroit, Salt Lake, Amarillo (Texas), and Portland, none of which are in the top 25 Hispanic markets (see Appendix). Using regional reporters, the newscasts tend to focus on issues that have an impact on the Hispanic community at large although some stories are market specific. For example, the Detroit affiliate won a local EMMY for a segment on gangs. By the end of 2007 the corporate plan is to be in four more markets. Equity partners with Univision (Gambrell). While not perfect as a source of truly local news, the "hub" system is a reality for many broadcast stations, Spanish-language or not. Stacey Woelfel, associate professor of journalism at the University of Missouri-Columbia is also a board member for the Radio Television News Directors Association.

> "It reflects that struggle that we have in the broadcasting business now of localism - which we know works and sells and pays and serves the community and everything else - and making as much profit as possible for the ownership" (Gambrell, 2007).

The economic issue hits big stations and networks as well. NBC, which owns Telemundo, sparked controversy in 2006 when it closed down several Spanish-language newscasts in markets with large Hispanic audiences and replacing them with regional newscasts (Gambrell, 2007).

Nevertheless, growth continues. The decision by Pappas Television to cut ties with Azteca and convert five stations to Spanish-language formats underscores the impact of the Hispanic audience even in cities such as Sioux City, Iowa; Omaha, Nebraska, and Reno, Nevada (Hispanic Television Update, October 4, 2007). The other two affected Pappas stations are located in Texas and serves Houston and California, serving San Francisco, both with a large Hispanic viewership. Pappas expects to have 13 stations formatted as Spanish-language during the first quarter of 2008. As for the importance of local news, Pappas Vice President/Hispanic TV Stations Group, Fernando Acosta calls it the "connection with your viewers" and says it is part of the Pappas business plan which they follow for all their stations, whether English or Spanish-language (F. Acosta, telephone interview, October 29, 2007). Acosta says the Pappas approach will be to take advantage of opportunities within each of their markets when it

comes to Spanish-language stations and how each develops will depend on the circumstances of the individual market. One big advantage today is the technology. Acosta says that the high cost of doing local news can be offset by use of technology but he strongly emphasizes the importance of content. He cites the tradition of Spanish-language media as a "voice of the community" and often these news operations will do stories that are more in-depth or community relevant than their English counterparts.

Seattle, Washington is another area seeing the impact of an Hispanic audience and the potential viewership it brings. Partnering with an established local station (KOMO), Seattle's Univision KUNS when on the air in July as the only local Spanish-language newscast in the region. In the Seattle area, a Univision executive predicts Hispanic spending will be well over $6.4 billion in 2007 (Valdes, July 7, 2007).

News: Developed Markets – Content and Recognition

The increasing number of newscasts and the importance in general placed on content by Spanish-language newsrooms has led to significant ratings growth and recognition of performance.   In June, Mi San Diego TV took top honors as best local newscast in San Diego (14th largest Hispanic market in the United States, Appendix A). It beat out all other local news competition, including the NBC O&O, KNSD. That is the station that produces the newscast. KNSD news director Greg Dawson believes it is the content – the newscast looks in-depth into issues affecting the community and works to flesh out stories with greater detail (Hispanic Television Update, June 20, 2007).

While recognition is an important way to build local and national credibility, for television news professionals, the real question is - will that translate into ratings. As a growing number of Spanish-language media newscasts are discovering, the answer is "yes".

News Ratings and Demographics: The Local Impact

In markets with larger Hispanic audiences, the younger news demographic is an attainable goal. The Univision O&O in Los Angeles, KMEX, "regularly wins the ratings war for the key 18-49 demographic group for its late news" (Project for Excellence in Journalism, 2007). For the summer months of June, July, and August of 2007, New York television news saw a new winner in the ratings race. WXTV's local 6 p.m. news (owned by Univision) won the key 18-34 demographic and came in second only to WABC, that network's O&O, in 18-49 and 25-54 local news viewers.   What is noteworthy about this development is that New York's Hispanic population is only about 20% (Bachman, August 29, 2007).

In the Dallas-Fort Worth market, the impact of Univision's KUVN is apparent. A general comparison of the 10 p.m. local news ratings for November 2003 through November 2006 shows the Univision Spanish-language broadcast compare favorably against the English-language newscasts in one of the key age demographics, 21-49.

Table 1.

STATION	Nov. 2003 21- 49 Demo	Nov. 2004 21- 49 Demo	Nov. 2005 21- 49 Demo	Nov. 2006 21- 49 Demo
KUVN Univision	3.03 Rating	4.30	5.33	2.85
WFAA ABC	5.27 Rating	5.35	3.73	4.36
KXAS NBC	6.76 Rating	5.50	5.06	5.35
KTVT CBS	2.78 Rating	3.26	3.22	2.41
KDFW FOX	3.17 Rating	2.89	2.47	2.17

Nielsen, NSI. November 2003-2006

In November of 2004, Nielsen reported that KUVN, the Dallas Univision station, won the 18-34 demographic against all English and Spanish-language stations in both the 5 pm and 10 pm newscasts. (Business Wire, November 19, 2004).

News Ratings and Demographics: The National Impact

The picture of growing overall strength for Spanish-language media is clearly seen at the national level. For the first time, under a new Nielsen ratings calculation Univision was the nation's number one television network for the week of August 27 through September 2 in the key 18-34 demographic. Regardless of language, the network won the demo in 9 of the top 20 programs that week (Univision, September 6, 2007).

News programming at the national level reveals a similar trend. A cumulative audience of 4.6 million viewers saw the broadcast of Univision's Democratic Presidential Candidate Forum over the 90-minutes of its presentation in September 2007.[1] Based on Nielsen Fast National Ratings, that number compared to only 4.3 million viewers watching similar debates on ABC, CNN, Fox, and MSNBC earlier in 2007. The key 25-54 demographic was also a winner for the Univision broadcast with 1,170,000 viewers compared to 787,000 viewers for the English-language network debates (Hispanic Ad.com, September 17, 2007).

Content and the Growing Role of Television News

For Spanish-language broadcasters, content is the primary draw. Regardless of age, education, or residency in the United States, content seems to be the driving motivation to watch television. Juan Carlos Aviles, television executive, consultant, and newscast producer/news director in both the United States and Mexico says watching television for Hispanic viewers is part of "staying in touch" with their country of origin. He called it "a little piece of home" (J.C.Aviles, telephone interview, October 21, 2007).

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[1] Questions were posed in Spanish. Candidates heard simultaneous translations in English through earpieces. Their responses were translated for broadcast into Spanish with English translations running on closed caption access. www.msnbc.msn.com/id/20677525

Aviles points out that Hispanic culture is very family-oriented, and multiple generations will watch television together. That activity "allows the family to continue the culture". Aviles adds that this puts both older, non-English speaking adults together with their children and grandchildren who do speak English but are now being exposed to Spanish-language content within the family structure. Univision senior vice president of research, Ceril Shagrin, says of the giant Spanish-language broadcaster's programming, "we tend to have more family-type viewing…children in homes where their parents are speaking mostly Spanish tend to watch Spanish-language television as a family" (Clemens).

The one of the most popular entertainment programming broadcast and consumed by viewers of all ages is the telenovela. A survey by research firm New American Dimensions reports the despite a generally strong preference for English-language media among U.S. born Hispanics, the draw of the telenovela is strong.

> TV viewing habits related to language preference are determined by content: "reality" programs and comedies are the biggest draw for English-language TV viewing, while Spanish-language "soaps" and novelas top Spanish-language viewing preferences. (HispanicAd.com October 25, 2005)

New American Dimensions' President David Morse believes the telenovela as content has an important relevance to "…second and third generation Hispanics. Spanish-language television is the only place you can see yourself on TV as an Hispanic" (Clemens).

Dr. Alan Albarran, director of the Center for Spanish-language Media at the University of North Texas reinforces the concept of cross-generational television viewing but adds another dimension – the importance news. "The media habits of Hispanics also bolster Univision. Television remains a family-viewing activity, helping the network capture younger viewers who are watching news and telenovelas with parents" (Arnoldy). Albarran also points out the different approach local news often takes on Spanish-language stations. The news content is "more focused on community issues, spending much less time 'chasing sirens'" (Arnoldy).   The former head of the National Association of Hispanic Journalists agrees calling the difference between English and Spanish-language news clearly being the "community-oriented" aspect.   Veronic Villafane called these newscasts a place where people "go to get services; these are your rights. It's really an education channel" (Arnoldy). According to Juan Carlos Aviles, results from local newscast focus groups conducted in Las Vegas revealed that Hispanic viewers – especially those with limited English or who were new to the country – saw local news as a "daily guide" particularly in the areas of health and education news.

As an example, Univision's "Noticiero" on May 11, 2006, did a news story for the New York audience about potentially thousands of residents who would lose their drivers' licenses because they did not have Social Security cards. The news anchor used the phrase "we should not get overconfident". In a news content analysis, the Pew Center for Excellence commented "the use of the word 'we' is interesting because of the way it links the identity of the station with its audience…there is a definite feeling that the news is aimed at a particular community…" (Project for Excellence in Journalism, March 13, 2006, National Spanish-language TV).   In that same survey looking at national and local newscasts in both languages on the same day, Pew researchers found about 36% of stories on all Spanish-language newscasts were about international topics. "That is far

above local TV's 9% and cable's 29%, those less than the national evening TV news with 48% "(Project for Excellence in Journalism, March 13, 2006, Ethnic Media Content Analysis). The draw of content is important to the Hispanic media, but another influence could have a dramatic impact not only on local Spanish-language newscasts but also on their English-language counterparts.

The Impact of Language on Local News

There is a growing body of research that suggests local television station executives may find a hybrid form of local news presentation and even content worth considering. Results from the most recent Diversity Markets report from research firm Synovate, point to an "increase in the proportion of bilingual respondents and the decrease among those who consider themselves 'Spanish-dominate'" (Clemens). While this study relies on self-assessment, the overall premise is supported by other research.
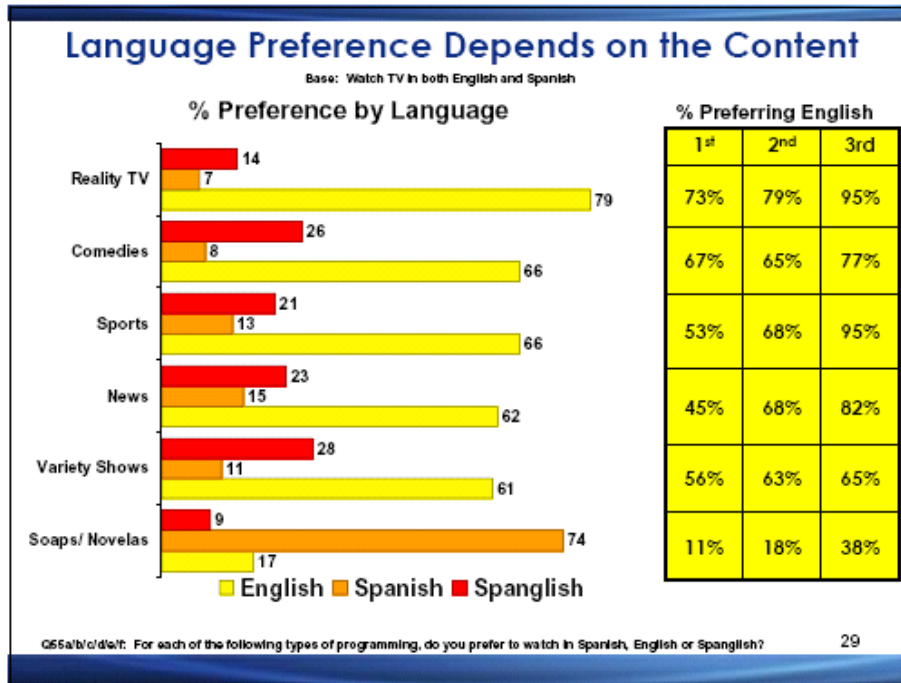
A wide-ranging report from the Pew Hispanic Center in 2004 showed a significantly increasing number of Hispanics watch news both in English and in Spanish, actually switching stations to get the different content. The survey showed "many more Latinos get at least some of their news in both English and Spanish than in just one language or the other" (Pew Hispanic Center). This is evidence of crossover language viewing. The importance of having news in two languages comes through in the survey results showing that even "fluent" English speakers relied on some Spanish-language media for particular content. At the same time, the survey said half of Latinos born aboard got at least some news from English media (Pew). This double dose of news viewing especially by bilingual viewers has an advantage. Veronica Villafane says these viewers "are getting a broader view" of the world (Arnoldy). In a specific finding that targeted 18-29 year old news viewers, the Pew study showed a:

> "…small but notable preference for English local television broadcasts…The English-only audience for local television news is stronger than the other language categories among young adults, ages 18 to 29, a key demographic…."

What still other research shows is a growing generational trend as younger Hispanic viewers to drift toward English-language media. According to David Morse, English becomes "nearly absolute among third generation Hispanics" (HispanicAd.com, October 25, 2005). That study, conducted by New American Dimensions ("Made in America"), reports language preference for television depended on the program content and that news in English is favored by a specific segment of the Hispanic population[2].

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[2] Respondents were between 14 and 29 years old and self-identified Hispanics. They were either born in the United States or immigrated when 5 years old or younger. The 25-minute survey was conducted three ways: On-line (nationwide); Intercept in Los Angeles, New York, Miami, Chicago, and Houston; and by phone in those same cities. Results were weighted by gender and categorized by generation.

Table 2.

Language Preference Depends on the Content

Base: Watch TV in both English and Spanish

% Preference by Language

% Preferring English

	Spanglish	Spanish	English	1st	2nd	3rd
Reality TV	14	7	79	73%	79%	95%
Comedies	26	8	66	67%	65%	77%
Sports	21	13	66	53%	68%	95%
News	23	15	62	45%	68%	82%
Variety Shows	28	11	61	56%	63%	65%
Soaps/ Novelas	9	74	17	11%	18%	38%

☐ English ☐ Spanish ☐ Spanglish

Q55a/b/c/d/e/f: For each of the following types of programming, do you prefer to watch in Spanish, English or Spanglish?   29

"Made in America: Communicating with Young Latinos"

This changing attitude within the Hispanic audience is fueling an increase in news programming and underscores the importance of content for these viewers.

Expanded Viewing Options and the Impact on News

Telemundo Communication Group president Don Browne, in his keynote address at the Hispanic Television Summit, said there is a "great opportunity to break out content and target the younger demo, the bilingual, acculturated Hispanics who consume mostly English-language media" (Multichannel News) and that content list includes news. According to Pew Hispanic Center data, U.S. born Latinos tend to be English-dominate watching Spanish-language TV with parents and English-language TV with friends. A recent poll of this particular audience found 81% of U.S. born Latinos wanted to be interviewed in English while 91% of foreign-born Latinos requested Spanish (Project for Excellence in Journalism, State of the News Media 2007).

Table 3.
Latinos Language in Which Want to be Interviewed
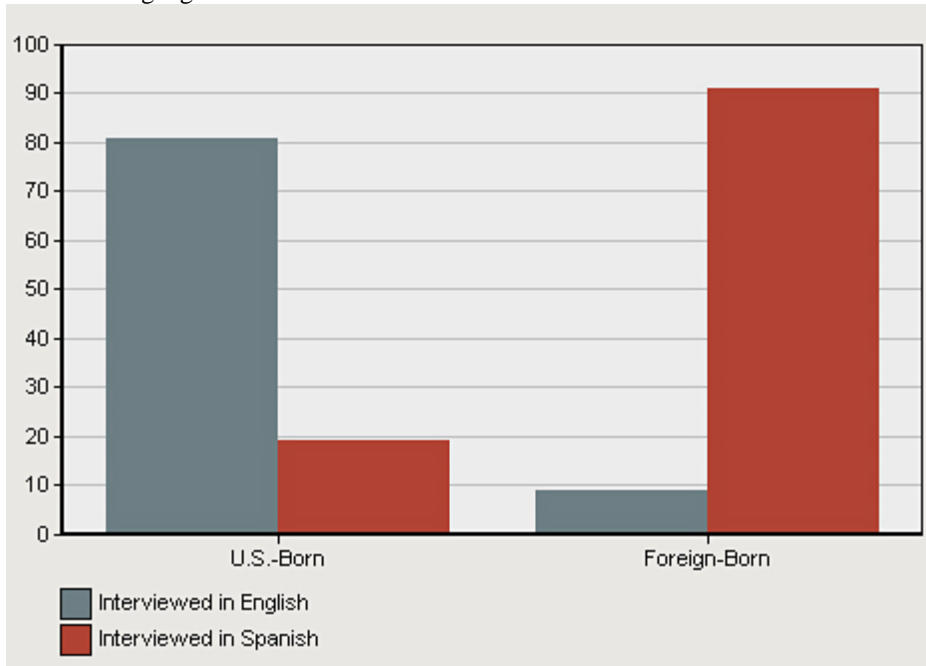
Pew Hispanic Center 2007 Intro to state of the news media

Still another study confirms the observation that Hispanics are crossover viewers relating to language but offers new information suggesting that news and political shows are the favored format. According to Miami-based Encuesta, Inc. (an Hispanic marketing and public opinion polling firm), 55% of Hispanics watched television in both English and Spanish compared to smaller groups who watched only in one language.[3] However, another finding in that study supported the observation that, whether they were born abroad or in the U.S., each group watched a significant amount of television in both languages (Encuesta, Inc.). Among the findings: 68% of Hispanic viewers reported watching news programs/political talk shows; 43% watched dramas/telenovelas with game shows least watched (11%). The most time was spent watching telenovelas in both English (5.9 hours) and Spanish (7.2 hours) Encuesta, Inc.).

Supporting data that show the importance of news to the Hispanic broadcast audience come from National Public Radio Dallas affiliate KERA. NPR stations across the United States follow a similar news and information format with some variations in local programming unique to the market. In Dallas-Fort Worth, the NPR station is KERA. According to program director Jeff Ramirez, the greatest common denominator in the NPR listening audience across the nation is educational level (J. Ramirez, telephone interview, October 17, 2007). Public stations report demographics with an above average education (often with a college degree or above) as a key audience marker. This is different from television news, which uses age demographics as a primary target.

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[3] 12% reported watching television only in English while 31% reported watching only Spanish-language television.

In a telephone interview, Ramirez says there has been a significant increase in Hispanic listeners for KERA based on the Arbitron radio ratings data (the radio equivalent of the television oriented Nielsen ratings surveys). According to Ramirez, the Dallas-Fort Worth market has shown significant growth in its Hispanic listeners especially noticeable when compared to several other large NPR markets.

Table 4.

STATION NPR	Spring 1994 Total Weekly Audience	Spring 1994 % Hispanic	Spring 2007 Total Weekly Audience	Spring 2007 % Hispanic
KERA Dallas-Ft. W	215,000 Listeners	6%	350,000 Listeners	9%
KPBS San Diego	140,000 Listeners	8%	240,000 Listeners	9%
KVOW[4] Seattle	152,000 Listeners	0%	350,000 Listeners	2%
WHYY Philadelphia	242,000 Listeners	0%	475,000 Listeners	2%

 Aribtron

Regardless of geography this example of the growth trends for Hispanic listenership supports the position of news as an important part of the total Hispanic electronic media menu.

Conclusions

Serving as both a cultural support and entertainment outlet for a minority language audience, Spanish-language television had a solid place in the community. Despite the changing makeup of the U.S. Hispanic population there is little evidence to suggest that local Spanish-language will suffer a loss of viewers, especially in the short run. Sonya Suarez-Hammond, vice president of multicultural marketing insights for consultant firm Yankelovich says, "The Hispanic population is acculturating to a great degree, but they are very much holding onto their heritage…where they have the best of both worlds and (are) adapting to both cultures" (Downey).

The study conducted by New American Dimensions also supports the conclusion that Spanish remains an important part of the U.S. Hispanic identity and that passing on the language to the next generations was important to this audience.

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[4] The markets reporting 0% indicate the particular audience was too small at that time to actually count in this system.

Table 5.
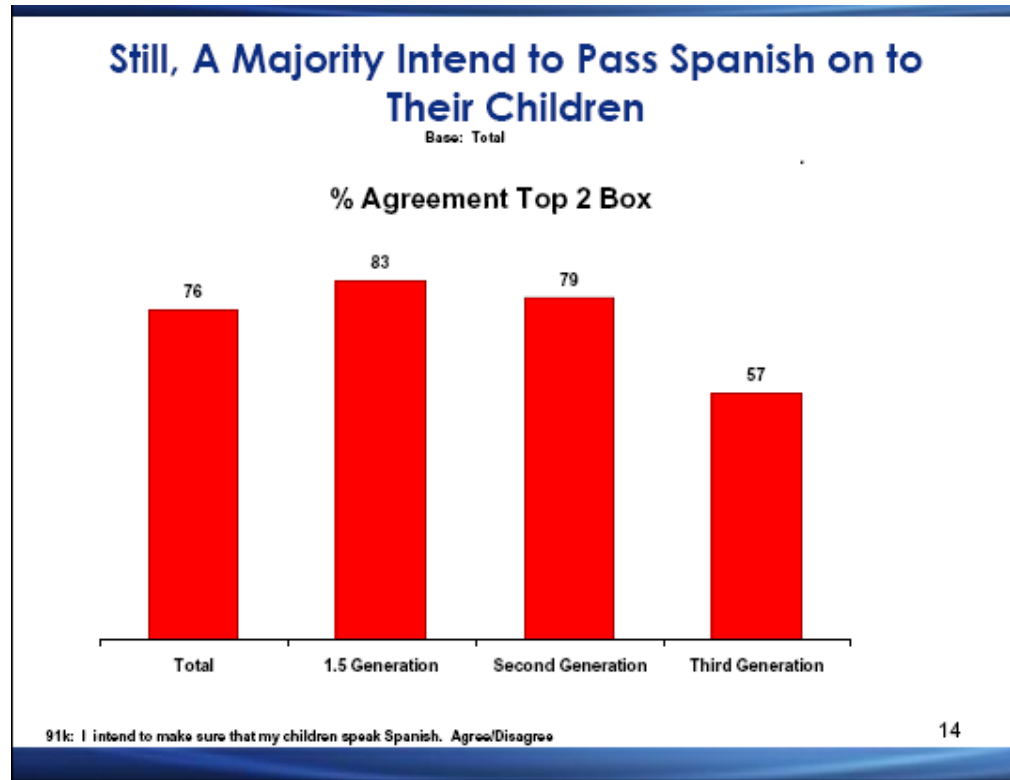
"Made in America: Communicating with Young Latinos"

As Aviles states, Hispanic viewers, whether new to this country or limited in their English, rely on television and especially news for day-to-day information. The intent of this paper, as stated in Research Question # 1, was to look at the role news in Spanish-language television.

RQ#1:   What is the general role of news, especially at the local level, in the overall content considerations of Spanish-language television?

There is strong evidence that news is an important part of the overall television draw for Hispanic viewers. Research suggests there is a strong crossover viewership with news as a key driver. A Pew Hispanic Center study characterizes Hispanic audience as having:

"…strong views about the roles the news media play….The vast majority of Latinos, including those who only get news in English, view the Spanish-language media as an important institution for the economic and political development of the Hispanic population". (Pew Hispanic Center)

From a local news perspective, Spanish-language newscasts tend to be more community-oriented (Albarran) and include more "news you can use" content (Aviles). These strong community ties, a tradition of content important to the audience, and the growth of Spanish-language newscasts at stations across the country strongly suggest the outlook for local television news in Spanish is in a healthy position.

But a different set of implications arises from considering the second research question.

RQ#2: As the Hispanic population in the United States continues to grow, the majority of this audience is already native-born rather than having immigrated. That fact alone suggests the English will have a greater role in the lives of this viewership. What potential impact could this have on local news as it is delivered on Spanish-language and English-language stations?

There is no clear answer to this question at the moment. This is a longer-term issue that will need to be addressed in numerous ways using approaches that fit market characteristics. The Annual State of the News Media Review for 2007, the Project for Excellence in Journalism posed this same question. Given the growing use of English by young Hispanics and the growth of that population "…will they switch over to largely English-language media, stay mostly with Spanish-language media outlets or adopt more of a hybrid…" (Project for Excellence in Journalism, 2007, Intro state of the news media). Future research can and should look at a number of potential ways in which to approach this development. With that in mind, there are several circumstances that have and will have an impact on any future actions by both local Spanish and English language television stations.

Nielsen Ratings Impact

The impact of the new Nielsen ratings methodology is one question needing a book-by-book analysis and then a more comprehensive evaluation as more data becomes available. Since 1992 Nielsen has provided television ratings for Hispanic television separate from national ratings. August 27, 2007 that changed. The company announced the National PeopleMeter panel now would be used to produce ratings for Hispanic television just as it does for non-Hispanic television. By eliminating the Hispanic-only National Hispanic People Meter, both Spanish and English language television is now measured on a single system, leveling the ratings playing field and allowing advertisers to compare all television on the same criteria (Nielsen, August 27, 2007). That change has already revealed the strength of Spanish media by the ratings win in key demographics the first week of the new system (Univision, September 6, 2007). Armed with this new and developing information resource, a close look at local news ratings with special attention to younger demographics in news on both Spanish and English language stations is critical.

Local Market News Research

A second recommendation for study coupled with the Nielsen analysis is the need to conduct research at the local market level. Sophisticated, market specific news studies carried out on at least three levels would provide considerable data to compare with incoming Nielsen information.

A comprehensive approach might include telephone surveys targeting the 21-49 year old Hispanic demographic with another analysis break at 25-34. A second measuring tool is focus groups. A variety of content approaches to news coverage would be created and compared to current content on both Spanish and English language newscasts. Using the results of presentations most appealing to both Hispanic and non-

Hispanic viewers, a new set of content examples would be developed. These would be fashioned along the community-oriented feeling prevalent in Hispanic local news. Results from these content-driven focus groups could be used in a number of ways.

One example might be a new, hybrid newscast appealing to younger viewers, Hispanic or not. The focus group results would also help define what we have called in this paper "crossover" content, material with a relevant connection to key demographic viewers irrespective of their language. Stations could then develop stories that would draw this demographic to their newscasts. Beside new viewers, the program could provide an expanded level of community service and journalistic value regardless of what language the newscast was aired

Still a third research approach is the on-line survey. While there have been some concerns that resulting data can come from a self-selective group rather than one strictly based on demographics, the on-line approach is becoming a more widely used and respected research tool. An example comes from a recent study produced by the Center for Hispanic Marketing Communication at Florida State University and DMS Research, the topic being the use of old and new media. This well-researched and documented study reinforces the importance of language preference in choosing which media to use by, among other linguistic groups, the Hispanic audience (Spanish, English, or both). In filling out the online survey, participants were asked to choose the language (for purposes of this paper, either English or Spanish) they wished to use in completing the questionnaire. The researchers created an analysis break based on which language participants used. Their analysis suggests that language is a "key lever for creating a connection" with people both groups (Korzenny, F. & Korenny, B.A). This supports the observation that perhaps "crossover content" can play an important role in developing local news relevancy.

A New Approach to Local News

A third consideration targets a partnership of a different sort between English and Spanish-language news outlets using the digital channels to transmit a jointly developed product. Since all television broadcasters must be airing via digital transmission by February 2009 there maybe an opportunity to create a new product for this new, hybrid younger viewer. For example, the digital channel could air community-critical information such as an all-weather format but with large and regular doses of local news, produced in the Hispanic style but in English. Sports could be another easily translated, format approach especially in larger markets with many high schools providing content. Again, the importance of local news as a part of this product is critical. In those larger markets, the actual newscast on a digital channel with content developed from extensive local research could be the focal point of a new, joint channel supported by both Spanish and English language stations who each provide entertainment and other content in both languages.

Summary

What we are seeing is a shift in media usage by all younger demographics in the United States. The issue of language and culture are more noticeable in analyzing

Hispanic media because of both the growing population/economic power of the audience and the language difference. But, at the same time there seems to be a third path developing that may bring a new vibrancy to local television news. Carl Kravetz, chairman of the Association of Hispanic Advertising Agencies observed that "…we're seeing the birth of what is really still in its infancy: English-language, culturally Latino broadcast media"'(Downey). That influence may lead to not just a hybrid form of local news and information but an even greater commitment at the local level to community service, solid journalism, and the notion that an engaged, quality-driven press is a fundamental part of living in the United States.

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Appendix A

Top 25 Hispanic Markets

Rank*	DMA Rank	Market	Hispanic TV HH	DMAs % of Total US Hispanic TV HH	Cumulative % Total US Hispanic TV HH
1	2	Los Angeles	1,817,270	15.0	15.0
2	1	New York	1,207,480	10.0	24.9
3	16	Miami-Ft. Lauderdale	635,610	5.2	30.2
4	10	Houston	524,810	4.3	34.5
5	3	Chicago	468,440	3.9	38.4
6	5	Dallas-Ft. Worth	458,410	3.8	42.1
7	37	San Antonio	367,650	3.0	45.2
8	12	Phoenix (Prescott)	358,440	3.0	48.1
9	6	San Francisco-Oak-San Jose	352,900	2.9	51.0
10	88	Harlingen-Wslco-Brnsvl-McA	279,880	2.3	53.3
11	20	Sacramnto-Stkton-Modesto	250,560	2.1	55.4
12	44	Albuquerque-Santa Fe	234,360	1.9	57.3
13	55	Fresno-Visalia	228,730	1.9	59.2
14	27	San Diego	227,530	1.9	61.1
15	18	Denver	221,980	1.8	62.9
16	98	El Paso (Las Cruces)	216,060	1.8	64.7
17	19	Orlando-Daytona Bch-Melbrn	186,430	1.5	66.2
18	4	Philadelphia	177,150	1.5	67.7
19	13	Tampa-St. Pete (Sarasota)	174,150	1.4	69.1
20	9	Washington, DC (Hagrstwn)	171,030	1.4	70.5
21	8	Atlanta	146,410	1.2	71.8
22	43	Las Vegas	140,570	1.2	72.9
23	51	Austin	140,320	1.2	74.1
24	7	Boston (Manchester)	128,890	1.1	75.1
25	68	Tucson (Sierra Vista)	115,840	1.0	76.1

Source: Nielsen   Media   Research   -   NSI,   Jan,   2008
*Ranked by Hispanic TV Households

Buying, Licensing and Launching:
Strategies to Defend Market Share in the Spanish Magazine Industry

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Abstract

The magazine publishing industry is suffering an intense competition environment in which firms try to defend their market shares. The context in which these companies operate rely on internationalization, concentration and specializations as the main driving trends. Strategic choices available include acquiring new titles from competitors, launching new original titles, and licensing foreign formats and brands to adapt external concepts to their geographical market. This piece of research shows a basic overview of the main facts and figures of the Spanish magazine industry in terms of circulation, advertising expenditure and the most significant groups, titles and market segments. In the context of the sector, the behavior of the publishing groups is analyzed in order to clarify which strategies are implemented depending on the size and ownership of the firms. This paper shows how medium-sized nationally-owned companies launch more original titles, while large international publishing groups depend more deeply on licensing and acquisitions as a way to defend and increase their market share. In addition, data shows how some market segments are still very active while others have reached a mature life cycle. The publication on a monthly basis is becoming preeminent among the new titles appeared in the market. The role of the Internet is discussed as both a threat and an opportunity for the magazine industry.

Key words: Spanish magazine industry, concentration, internationalization, mergers and acquisitions, licensing, magazine launching, magazine competition.

Buying, Licensing and Launching:
Strategies to Defend Market Share in the Spanish Magazine Industry

Magazines have a market presence for almost four hundred years. During the Eighteenth century they were the main providers of news, entertainment and commercial messages. But later on new products appeared with the aim of capturing both money and time from the public; they would also try to conquer a growing share of the advertising expenditures. Daily newspapers, radio stations, television channels and on line services are the main magazines' competitors. "Below-the-line" advertising media are other relevant substitutes.

Magazines have survived (and some even thrived) in the overcrowded media landscape thanks to the creativity and innovative spirit of managers, journalists and designers. They have also been able to discover new contents, focus and journalistic outlooks, new designs and formats and fresh marketing strategies to attract the readers' interest.

The word "magazine" comes from the French name "magasin", which comes from the Arabic "makhazin", which means the storehouse or place to keep things (Hildick, 1966). Peterson (1989) explains that magazines are publications with a variety of contents in every issue; and Wiecchmann (1993) points out that the magazines' pieces of news, articles, special features and advertisements have as a main goal the readers' entertainment. Perhaps such broad concepts –which allow different regular recurrence, editorial profiles, and quality and quantity of stories- have fostered the evolution and success of magazines.

However, after a long fight against a growing number of rivals and substitutes, magazines seem to be in a weaker position (McKay, 2006). Daily newspapers have improved the quality of printing, which used to be a relevant competitive advantage of magazines within the print sector; media companies have launched thematic radio stations and television channels, going into one of the traditional magazine domains; online services are often more participative than magazines and explore all kinds of lifestyles and interests; and advertisers can find advertising platforms more efficient than magazines.

Growth strategies of media companies are very determined by the existence of entry barriers. In the communications sector, newspapers, radio stations, recording companies and television channels suffer strong entry barriers, from technical, legal and market points of view; therefore, leaders are almost always able to hold their hegemonic positions for a long time.

However, magazines are in the opposite situation (Kaiser and Wright, 2006). It is not easy to protect the market share reached with similar procedures to those in other print media or the audio-visual sector: concessions or legal approval are not required; usually it is not possible to obtain competitive advantages based on distribution systems; bottlenecks, that make difficult the survival of companies without vertical integration, do not exist; consumer's habits of consumption change easily; and the required initial investment is moderate, at least when compared to newspapers, television, movie production or the music industry (Hafstrand, 1994). As a result, almost every day each magazine suffers "the assault" of new titles and other media outlets.

Generation of subscriptions in magazines not only depends on the publisher's ability to increase customer satisfaction, but also on including contents of a certain quality and depth. The content quality of articles is the most important factor for the reader to become subscriber (Tsourvakas, Agas, Zotos and Veglis, 2004).

Diverse empirical pieces of research demonstrate that most magazines do not reach four years of life in the market (Husni, 1988). Magazines that survive are typically published by an

individual entrepreneur with a concept adapted to the needs of the specific market in which it is distributed. They tend to be more geared to readers than to advertisers. In order to become successful companies, magazines must go through certain stages of their life cycle in which they have to cope with different challenges. Surviving those stages is a good sign for promising publications, but it also means to face adaptation to market and reader's change (Husni and Main, 2002).

The Spanish market is an interesting laboratory to analyze the strategies developed by editors and managers of magazines. During the last two decades, the largest American and European publishing companies have invested in Spain. Two reasons explain such trend (Caño, 1999; Gutiérrez, 2004; Montero Rodríguez, 2005): first of all, the strong growth of the Spanish advertising market; secondly, Spain is considered as a "bridgehead" for the Latin American market, which has the attractiveness of having more than 300 million of Spanish speaking consumers.

In this paper we present the main characteristics of the Spanish magazine market and the publishers' strategies to protect their businesses in a very competitive landscape. We will start looking into the main trends both in terms of circulation and advertising revenues. After that, we will describe the internationalization and concentration of the market. Then, we will analyze the defensive strategies developed by editors: buying, licensing and launching new titles. Finally, we will explain the advantages and disadvantages of each one of those three options to protect the groups' market share.

1. Magazines looking for their niche

Magazines shape a very dynamic sector with new titles that change according to transformations in time, leisure and lifestyle patterns (Ringlstetter and Vizjak, 2001). At the same time, this is in general a mature media sector, where growth –when it occurs- is only moderate. Titles show a growing trend to audience segmentation and content specialization. Barriers of entry are low and that makes the publishing market vulnerable to such strong newcomers as cable and satellite TV and, specially, the Internet.

The Internet is already having an impact in the magazine market. Many newspapers and magazines are using, intentionally or not, the digital edition like a substitute of the print one, assuming the risk of cannibalization of their own main product. This risk-taking trend is explained fundamentally by two factors: the percentage of free digital product, and the percentage of content that is published simultaneously both in digital and print editions (Fetscherin and Knolmayer, 2004). However, magazine publishers have taken steps backwards as far as the availability of contents in Internet goes. They are using this medium more as a promotional tool of their printed edition. In any event, Internet's competition is a major factor in current magazines' life.

Women's titles circulation is a major factor in the Spanish market. Among the top 50 magazines in terms of circulation in 2005, 22 were predominantly targeted to women. Also, among the top ten selling magazines as many as eight are women magazines. Five of them are celebrity content titles, a category of its own in Spain (*Pronto*, *Hola*, *Lecturas*, *Que me dices* and *Semana*). Table 1 shows the top twenty-five magazine in circulation.

The home decoration market segment tends to grow in sales terms, with three titles among the top twenty selling and six among the top 50. The top publishers are represented in this segment which boasts of a large number of readers.

Intense competition among the largest publishers is showcased in the fierce struggle among the top three scientific popular titles: *Muy Interesante* (G+J), *National Geographic*'s Spanish edition (RBA) and *Quo* (Hachette). *Muy Interesante* and *National Geographic* are among the top twenty selling titles.

Emerging segments include computing (two among the top fifty) and videogames (one among the top fifty). Axel Springer and Zeta are direct competitors in that market. Some titles are also salient in the health and cooking segments, which seem to have potential according to market experts.

Among the top fifty magazines in circulation there are no business press titles or newsmagazines (*Emprendedores*, the first business title ranks 65th, and *Tiempo*, first newsmagazine, ranks 83rd). Television magazines are also in the midst of a sales decline. *Teleprograma*, the market leader, is just number twenty five in sales terms.

TABLE 1. Top Twenty Five Spanish Magazines in circulation

Magazine	Circulation 2005	Circulation 2004	Difference 05/04 (%)
Pronto	989.820	1.013.016	-2.29
Hola	539.468	604.115	-10.70
Diez Minutos	260.565	281.524	-7.44
Glamour	259.790	258.682	0.43
Clara-Pocket Edition	258.219	-	-
Muy Interesante	257.817	259.545	-0.67
Lecturas	254.137	270.065	-5.90
Cosmopolitan	221.063	233.515	-5.33
Que me dices	216.495	252.981	-14.42
FHM	202.744	219.294	-7.55
Semana	201.929	243.503	-17.07
El Mueble	198.677	203.888	2.56
Mía	197.333	198.533	-0.60
Clara	197.108	181.969	8.32
Cosas de casa	193.351	216.135	-10.54
Bravo por ti	190.124	170.800	11.31
National Geographic	189.174	194.492	-2.73
Elle	184.594	158.636	16.36
Saber vivir muy saludable	177.472	149.666	18.58
Casa Diez	172.376	203.178	-15.16
Super Pop	170.720	148.899	14.65
Telva	165.247	167.239	-1.19
Mente Sana	154.816	-	-
Psychologies	151.225	-	-
Teleprograma	144.013	152.917	-5.82

Source: Oficina de Justificación de la Difusión (OJD), Spanish Audit Bureau of Circulation (2005)

Overall circulation remains high and total readership is above eighteen million readers. However, only thirteen titles among the top fifty increased their circulation in 2005. Among the top ten selling magazines, eight lost circulation. Among the top twenty, as many as fifteen titles lost circulation. Concerns about circulation seem to be fully justified.

Magazine circulation has an impact on the different sectors, although selling more or less has an influence that changes according to different segmentation levels (see table 2). Celebrity, and in general, women magazines, home decoration and scientific popular titles account for a relevant market share. But a look to smaller segments allows some future predictions and shows incipient trends.

TABLE 2. Spanish Magazine Circulation in the main market segments (2003)

Market Segment	Circulation
Celebrity	2.725.085
Women	2.094.976
Home Decoration	1.533.835
Scientific Popular	965.772
Motor	804.245
Family	449.701
Music	440.769
Television	438.265
Lifestyle	387.112
Sports	373.913
Food and Cooking	346.266
Videogames	337.796
Travel	268.096
History, Art, Literature	232.880
Business	232.029
Sewing and Patterns	216.900
Children	206.449
Movies, video and photography	189.281
TOTAL	11.593.370

Source: OJD, December 2002-September 2003. Market segment titles are the same used by OJD. Lifestyle magazines are men titles like DT Downtown, Man, Maxim, Men's Health or Primera Línea.

Sales volume in the car magazine segment, where Motorpress has a dominant position, is already very significant. Computing and videogame titles are growing in circulation, like cooking, health and travel. The main publishers tend to explore such sectors where there seem to be more market opportunities and growth potential.

2. Declining Advertising Expenditures

Economics of consumer magazines is based more and more in advertisers and less in readers. This trend is explained by the fact that advertisers are prepared to pay more by their advertisements, while readers do not tolerate significant increases of cover price. When readers'

demand falls, publishers are accustomed to respond with price decreases. By the same token, when advertising demand increases, rates raise (Sumner, 2001). Magazines have been able to cope with stagnant readership because advertisers were ready to pay a premium for their specific targets. But advertising expenditures are not increasing significantly, which threatens the medium's future.

Magazine advertising grows at a rate that does not match increase in the number of titles. As a consequence, each title faces strong pressure to keep its advertising income. Magazines are not getting easily in many advertisers' media plans. Although the magazine market total expenditures grow year after year and have reached more the 688 million € in 2006, magazine advertising is losing share to more dynamic media like cable and satellite television and the Internet, and is not keeping well its position when compared with media with lower expenditures like outdoor and radio.

Growth seems to be slowing down. This figure was 566 million € in 1999, it almost reached 620 million by 2001. However, after that sharp increase, growth can be considered only moderate, in line with general trends for advertising expenditures. The last available figures show that the overall media market has seen advertising grow 7%. But magazine growth was just 2%. Dailies (7.5%), Outdoor (7,1%), Television (7,8%), and the Internet (33%) grew all above market average growth.

The decline is more apparent in newsmagazines and women's titles that have lost a 7.8% of their advertising expenditures. As a matter of fact, among traditional advertising media, magazines are the medium with the second share loss. Only daily newspapers have also lost advertising share. In advertising market share terms, magazines are still the third traditional advertising medium (see Table 4). But their market share is just 9.6%, far below the 44.5% achieved by television, or even the 25% that daily newspapers get. Magazines' advertising share has actually decreased more than one point in the last five six years.

In the meantime, Internet has seen its expenditures multiply by three and television, already the largest advertising medium has grown 4.4 percentage points. It is interesting to note that cable and satellite channels, direct advertising competitors for magazines, have multiplied their expenditures for 2.6 in the last three years (from 16.8 million € in 2003 to 44.5 million € in 2006). Radio and outdoor are actually keeping its share stable, with radio approaching magazine levels. Those figures seem to justify the pervasive skepticism among researchers that do not forecast significant market changes.

TABLE 3. Overall Magazine Advertising Expenditures 1999-2006 (million €)

	1999	2000	2001	2002	2003	2004	2005	2006
	566,8	618,4	619,9	590,1	601,2	664,3	674,6	688,1

Source: Infoadex.

TABLE 4. Spanish Media Advertising Share (2000-2006)

	2000	2003	2006
Television	40,1	41,3	44,5
Dailies	29,2	26,8	25
Magazines	10,7	10,8	9,6
Radio	8,6	9,1	8,9
Outdoor	7,3	7,5	7,4
Internet	0,9	1,3	2,2

Source: Infoadex

3. Concentration and Internationalization

Concentration and internationalization seem the basic answers publishers give to the magazine sector's woes: loss both of readers and advertising. That has paved the way for growth for the largest groups and has spearheaded a growing entry of multinational publishers in the Spanish market, which might be attractive both because of significant economic growth and the Spanish language that might allow large publishers to test content for the Spanish-speaking community worldwide.

Current research underlines the magazine markets' international features (Daly et al., 1996). FHM provides an example. In its case, it has been demonstrated that to calculate the available brand image returns, publishers need to consider not only the opportunities for domestic and international operation of the magazine, but also the potential to extend the brand in additional media platforms and complementary product markets (Doyle, 2006). Other fundamental aspects of this industry are i) the importance of subscriptions, ii) the uniqueness of the product life cycle, iii) the nature of the market, characterized by two customers and iv) the relations between print media and their electronic editions.

Concentration is also a key market factor. In spite of a large number of titles, typical in the magazine market elsewhere, large publishers are very relevant in market power terms, as Cabello found out in his early study of the Spanish magazine market (Cabello, 1999, 1995).

The role of the largest publishers among the top selling titles seems to be apparent. However, concentration in terms of circulation does not seem to be matter of concern. Among the top fifty titles we find 11 Hachette titles. The French publisher is followed by RBA (7), Edipresse (6), G+J (4), Zeta (2), Axel Springer (2), Condé Nast (2) and Recoletos (1). Thirty two titles are published by eight different publishers.

Recently, a merger was announced between RBA and Edipresse. When completed, the resulting magazine publisher will rank number one in terms of readership and number two in advertising income. The trend to consolidation might continue as magazine advertising market share continues its downward spiral.

In advertising terms, Table 5 shows advertising billings for the top ten magazine publishers and its share of the advertising market in 2004. Concentration here might be more important than in circulation terms. The top ten publishers concentrate more than 88% of the magazine advertising expenditures. The four largest (Hachette, Zeta, RBA and G+J Spain) account for almost half of the total expenditures (49.1%).

TABLE 5. Top Ten Spanish Magazine Publishers' Advertising income and market share (2004)

Publisher	Advertising income	% Magazine advertising market
Hachette	126.9	19.1
Zeta	70.4	10.6
RBA	68	10.2
G+J Spain	60.9	9.2
Motorpress	56.2	8.5
Condé Nast	52.4	7.9
Edipresse	51.5	7.7
Hola	40.4	6
Recoletos	35.1	5.3
Heres	24.7	3.7
TOTAL	586.5	88.2

Source: Infoadex.

Nine publishers own magazines whose audience exceeds 1.874.000 readers, according to EGM (see Table 6): Hachette, RBA, Edipresse, G+J, Heres (Pronto magazine's publisher), Zeta, Motorpress, Hola and Axel Springer. Recoletos group will also be mentioned because of its relevance in key markets. Condé Nast also has a presence with *Glamour*, *Vogue* and *GQ*. Five of the top ten groups are owned by foreign companies. Besides, many of the recent market successes are licensed multinational magazines. Three of them are among the top ten selling titles in Spain in 2005: *Glamour*, *Cosmopolitan* and *FHM*.

The French magazine group Hachette Filipacchi has become magazine publishing's leader in Spain in the last ten years. Its market figures are impressive: an overall yearly circulation of 68 million for its titles, a net audience above 10.5 million readers and total billings in 150 million € Hachette's market share is as high as 15% of the overall magazine sales. Its 23 titles span the most relevant market segments and include *Así son las cosas*, *AR*, *Car and Driver*, *Clío*, *Casa Diez*, *Crecer feliz*, *De viaje*s, *Diez Minutos*, *Elle*, *Elle Deco*, *Emprendedores*, *Fotogramas*, *Mi Casa*, *Nuevo Estilo*, *Psycologies*, *Qué leer*, *Qué me dices*, *Quo*, *Ragazza*, *Supertele*, *Teleindiscreta*, *Telenovela* and *Teleprograma*.

Hachette leads segments such as movie magazines (*Fotogramas*), business and entrepreneurial (*Emprendedores*), young women (*Ragazza*) and literature (*Qué leer*). Other titles are key players in their magazine sector, especially *Casa Diez*, *Car and Driver*, *Diez Minutos* and *Quo*. Television magazines are a market totally controlled by four titles owned by Hachette.

RBA is a Spanish publisher withalmost seven million readers, and is also a significant player abroad through its titles in Argentina, Mexico, Colombia and Portugal. Besides, RBA is a very strong player in the home decoration market sector. This company owns eight home and decoration titles, including *El Mueble*, *Cocinas y Baños*, *Arquitectura y Diseño*, *Casas de Campo*, *Casa al Día*, *Cosas de Casa*, *Extras El Mueble*, and *Extras Cosas de Casa*. It also licenses for Spain the *National Geographic*'s Spanish franchise (plus its travel and history special editions).

RBA includes among its properties one of the top selling health titles in Spain according to OJD's rankings (*Saber Vivir* and *Cuerpomente*), and other health and cooking products like *Integral*, *Vivir Feliz*, *Cocina Sana y Natural*, *Cosas de Cocina* and *Extras de Cuerpomente*.

Speak Up, *Amadeus*, *El Mundo Medieval*, *Arqueo* and children magazines *Barbie*, *Princesa*, *Winnie the Pooh* and *Mickey*. All this magazines shape a large group, with as many as 28 titles.

Edipresse, a Swiss publisher, has an audience of more than 6.7 million readers. Its most salient titles include women's *Lecturas*, *Clara*, *In Style* and *Sorpresa*. Other Edipresse's products include *Mujer 21*, *Tu Bebé*, *Habitania*, *Ideas y puntos*, and *Rutas del Mundo*.

G+J, Bertelsmann's magazine publishing group, has an outstanding presence in the Spanish market with more than 5.4 million readers. *Muy Interesante* leads the popular scientific segment. It also owns Spanish franchises of well-known multinational brands like the successful *Cosmopolitan* (the second largest selling magazine in Spain outside celebrity titles), *Marie Claire*, *Capital* y *Geo. Mía*, *Ser Padres Hoy*, *Ser Padres Bebé*, *Muy Especial* and *La Casa Marie Claire* are the other titles published in the Spanish market by this German publisher.

Zeta also has a relevant presence, with more than 3.3 million readers. It publishes two weeklies (*Tiempo* and *Interviu*), and twelve monthly magazines covering several of the key market segments: *Man* and *Primera Línea* (men's titles); *Woman* and *You* (women's); *PC Plus* (computing) and *Viajar* (travel). *Playstation 2 magazine*, *Superjuegos*, *Cartoon Network Magazine*, *Supermini* and *Megatop* secure a strong Zeta presence among children and young audiences.

Motorpress, a Stuttgart-based German publisher, enjoys dominant position in the car magazine market with nine titles and 71% market share. The group's overall circulation in Spain is above three million readers. Its titles are *Autopista*, *Coche Actual*, *Automóvil*, *Autovía*, *Maxi Tuning*, *Autoverde 4 por 4*, *Motor Clásico*, *Guía Útil* and *Automercado*. The same pattern is repeated for motorbikes, where *Motociclismo*, *Motoverde*, *La Moto* and *Scootermania* account for a combined 73.9% market share. Its two transport titles are above 50% market share (*Avion Revue* y *Transporte Mundial*). It is also a successful sports publisher with specialist titles like *Ciclismo a fondo*, *Bike a fondo*, *Tennis a fondo*, *Diving a Fondo*, *Ecuestre*, *Navegar*, and *Runner's World's* Spanish franchise. *Connect* in the technology sector, *Sport Life* and *Men's Health* Spanish complete Motorpress's 26 titles in Spain.

The German publisher Axel Springer has specialized in the Spanish market in computing and videogames. Its titles lead both segments with more than 1.8 million readers overall, and include *Computer Hoy* (the largest computer magazine in Spain), *PC Today*, *Personal Computer & Internet*, *Hobby Consolas* (that leads the lively videogame magazine sector), *Playmanía GT*, *Nintendo Acción* and *Play2 Manía*.

Recoletos has a presence in the magazine market through two traditionally significant players –the business magazine *Actualidad Económica* and women's monthly *Telva*- and a newer but successful title, *Marca Motor*. More recently, it has added the weekly *Correo Médico*, targeted to medical doctors. Although, sales are not outstanding in the overall market, advertising billings is relevant when compared with its relatively small number of titles, which makes Recoletos worth mentioning in this context.

American publisher Condé Nast has also achieved success in the Spanish magazine market with *Glamour* (2005 circulation: 259.790) and the high-end fashion book *Vogue* (108.341). It also publishes a Spanish edition of *GQ* (37.227) and *Traveler* (20.215), among other titles.

TABLE 6. Largest Spanish Magazine Publishers in audience terms (2004)

Magazine publishers	Audience 2004
Hachette Filipacchi	10.811.000
RBA	6.852.000
Edipresse	6.697.000
G+J Spain	5.411.000
Heres	4.591.000
Zeta	3.339.000
Motorpress	3.070.000
Hola	2.733.000
Axel Springer	1.874.000

Source: EGM, 2004 average figures. EGM (Estudio General de Medios) is the leading multimedia audience research provider in the Spanish market.

4. Three ways to defend market share

Companies that want to introduce themselves in the magazine publishing sector of a geographic market have three basic entry routes (Hafstrand, 1995): i) buying one or several existing magazines or, ii) launching a new title or iii) adapting a format from another market. Each strategy includes advantages and disadvantages.

Acquisitions allow a quick market presence, but at the same time require the largest financial investment. In addition, the buyer usually pays a high "price earnings ratio" for some assets that are very exposed to "external attacks" (i.e., launchings of new titles). Acquisitions make sense when the publisher considers that it is possible to improve management in the acquired company in aspects like advertising management, content transformation, promotional strategies, cost control, or synergies with other business units so that benefits' increase justifies the sale price (Depken, 2004). Some recent examples of mergers and acquisitions have happened in the Spanish market.

The Spanish company RBA has merged with Swiss publishing firm Edipresse in Spain in order to create the leading magazine publisher in the country. RBA will maintain two thirds of the shares of the new company. Additionally, other operations consist on the acquisition of particular titles. This was the case when MC Ediciones bought in 2001 JC Ediciones, including the two main titles of the firm: *Más allá de la ciencia* and *Kerrang*. French publisher Hachette has based part of its strategy in Spain on buying particular magazines from competitors. This strategy has permitted Hachette to control overwhelmingly some segments of the industry such as television programming magazines.

The launching of new titles comes with a moderate cost, because most of the material assets may be owned by others. The economic risk is almost limited to the promotion campaign to introduce the title among potential readers and advertisers. The downside of this entry route is that there is never certainty that the new magazine will be welcomed in the market. Previous studies do not guarantee that the new magazine will attract enough readers and advertisers to allow its viability. If the acquisition implies paying a high amount by each "acquired reader", a launch implies to pay little to reach an unknown number of readers. Data on new titles launching in Spain are included below.

TABLE 7. New title launchings in Spain (2000-2004)

	2000	2001	2002	2003	2004	TOTAL
New titles	38	35	56	39	56	224

Source: *Noticias de la Comunicación*

Within the Spanish magazine industry, an average of 44.8 new magazines per year has been launched between 2000 and 2004. This figure can be considered moderate in comparison with the country population, 42 million people. But data varies deeply depending on the different market segments.

TABLE 8. New title launchings by segments (2000-2004)

Market segment	2000	2001	2002	2003	2004	TOTAL
Sports	5	6	7	5	7	30
Motor	4	1	6	5	6	22
Computers	7	5	1	1	2	16
Children	1	3	5	3	4	16
Women	2	1	3	3	4	13
History, art, literature	1	3	2	3	3	12
Lifestyle	0	3	2	2	5	12
Health	4	0	4	2	2	12
Home decoration	3	2	2	1	2	10
Food and cooking	2	1	2	1	4	10
Video games	2	3	4	0	0	9
Professional	0	1	4	2	0	7
Music	0	0	1	1	5	7
Travel	1	0	0	0	6	7
News and events	2	0	0	3	2	7
Movies, video and photography	0	0	3	2	1	6
Business	2	0	1	2	0	5
Sewing and patterns	0	0	3	1	0	4
Electronics	0	1	0	1	2	4
Animals	1	1	1	0	0	3
Family	1	1	1	0	0	3
Television	0	0	2	1	0	3
Scientific popular	0	1	0	0	1	2
TV shows	0	0	1	0	0	1

Source: *Noticias de la Comunicación*

In the last years, competition within some segments such as sports, motor, computers and children has increased significantly. A big amount of new titles have appeared as well in some other segments like women, history, art and literature, men's lifestyle and health. New market segments poorly covered in the past has been raised, particularly computers, videogames, men's lifestyle and mental and physiological health. On the other hand, traditional segments like television, family, scientific popular and pets have suffered little changes. Consequently, it is possible to identify some mature segments and other incipient segments in the Spanish consumer

magazine industry. The patterns identified are not that different from those of other Western countries. New launchings varies as well depending on the publisher's characteristics.

TABLE 9. New title launchings by publishing group (2000-2004)

Publishing group	2000	2001	2002	2003	2004	TOTAL
MC Ediciones	2	6	5	3	6	22
Grupo V	1	1	4	3	2	11
RBA Revistas	4	4	1	2	0	11
Editorial Aurum	0	0	11	0	0	11
Zeta	0	3	1	2	1	7
Hachette	0	1	3	1	1	6
Editorial América Ibérica	2	2	0	0	2	6
Hobby Press	3	1	0	1	0	5
Heinrich Bauer	2	0	0	1	2	5
Globus Comunicación	1	0	3	1	0	5
Ixo Publishing Ibérica	0	0	2	1	2	5
G+J	1	0	0	0	3	4
Bayard Revistas	0	3	1	0	0	4
Grupo Revistavision	0	1	0	2	1	4
Edipresse	2	0	0	0	1	3
Motorpress	0	1	1	0	1	3
Ediaction News	3	0	0	0	0	3
Larpress	2	1	0	0	0	3

Source: *Noticias de la Comunicación*

The top five most active publishing companies in the Spanish market are Spanish owned companies. Except RBA and Zeta, they are all small groups trying to reach a reasonable market share in some highly specialized segment in an industry traditionally controlled by global players. International publishers, that maintain a strong position in Spain, such as Hachette, G+J or Edipresse, have been less proactive in recent years. Generally, the small nationally owned firms are launching more titles, but with a narrow target.

The global publishers are launching fewer titles, but they are broader in target terms and invest more money on marketing campaigns. They prefer to own fewer magazines but stronger ones, which are able to support a high market share in terms of readers, subscribers and advertisers. A big amount of micropublishers have launched less than 3 titles in the 2000-2004 period. As far as publication patterns are concerned, the monthly edition has proven to be the favorite among recent readers.

TABLE 10. New title launchings by publication (2000-2004)

Publication	2000	2001	2002	2003	2004	TOTAL
Weekly	1	2	7	4	7	21
Biweekly	2	0	2	1	0	5
Monthly	26	29	22	31	28	136
Bimonthly	2	1	9	1	11	24
Quarterly	5	3	10	1	0	19
Half-yearly	2	0	3	1	0	6
Yearly	0	0	2	0	0	2

Source: *Noticias de la Comunicación*

More than a half of the new magazines published are distributed on a monthly basis. Weekly, bimonthly and quarterly magazines are still relevant in the industry, but to a lesser extent than in the past. Readers are looking for in-depth and specialized information more than a high number of issues per year. For the example, the business and economy segment was really blown up when two foreign monthly formats, *Emprendedores* and *Capital*, went into competition against traditional weekly publications. In a few months, they reached more than 50 per cent of the segment. The key success factor was based not only on the editorial models, but as well on publication patterns. Readers demonstrated that were not so interested on late news weekly issues, but on more elaborated and analytic monthly editions.

Finally, adaptations or licensing of previous formats are somewhere in between the two other entry routes. They do not imply complete newness -because at least one identical or similar version exists in another market-, yet the offer is new for its potential readers. The economic risk is smaller than in acquisitions and the possibility of failure is diminished when compared to launching a new title. Media firms can adapt their own titles or reach licensing agreements with other companies.

The adaptation can be very similar to the original version -only with some "local" pages- or can imply a name change and differences in most contents. The name is respected if the brand has value in the new market and it is altered if it is not adapted or known by the potential readers.

The Spanish market has proved a good laboratory for licensing international editions of foreign magazines. Recent adaptations include *Rolling Stone*, *Gentleman* and *Foreign Policy* (published by Grupo Prisa), *Nueva Burda* (from the German original *Burda Moden*, published by Ediciones Aurum in Spain), the already reviewed *Emprendedores* and *Capital*, *Management Digest* (Hachette), *Runner's World* (Motorpress) or *FHM* (Meta Ediciones). In general, adaptations from other countries' formats have a high rate of success. The most relevant exception to this trend was the Spanish edition of *Paris Match*, which felt quickly in readership and advertisements.

A different type of licensing agreement consists of launching the magazine product of other media and entertainment brands. Some recent examples includes video games (with official magazines for *Play Station 2*, *Xbox* and *Dreamcast* video players), television channels (such as *MTV*, *Fox Kids* and *Cartoon Network*) or event television stars that license their image and name for a personal magazine (like the journalist Ana Rosa Quintana, who launched in agreement with Hachette *AR, la revista de Ana Rosa*).

5. Conclusions

In this piece of research, qualitative and quantitative information has been analyzed in order to understand more deeply the behavior of the Spanish consumer magazine market. After general industrial information, which summarizes main trends in circulation, advertising expenditure, market concentration and firm's ownership, players' strategic responses have been studied within a highly competitive landscape. Main conclusions are included below.

i) During the last five years, a big amount of launchings has been implemented by the main magazine companies. On average, 44.8 new titles were launched per year. This is the most frequent system used by firms to protect their position in the market. This trend has been particularly apparent in some market segments, such as sports (30 launchings between 2000 and 2004), motor (22), computers (16) and children (16). However, other market segments that were very active in the past are nowadays mature sectors, like family (3 launchings in the same period), television (3) and scientific popular (2). Additionally, it has been observed that when one of the biggest magazine companies launches an editorial product, in the following months some of the rivals launch a competing title within the same market segment. So that, imitation from the big players is still a trend in the sector.

ii) Medium-sized magazine companies launch a significant amount of the new titles that appear in the market each year. This is almost their only way to increase their presence in the market, as far as a) they do not have resources enough to acquire other titles from competitors, and b) they are not chosen by owners of successful international titles and formats as partners for the Spanish geographic area. These medium-sized companies are frequently owned by national shareholders. On the other hand, large companies are responsible for a minor number of launchings, although they spend more money on marketing budgets for each new title. These firms use all three systems to defend their market share; in addition to launching new titles, they have assets enough to acquire magazines from competitors and bargaining power to negotiate format licensing from other media agents. Small publishers typically own a few titles, but they are not very active in structural changes in the market.

iii) New strategies to launch titles in the market have been identified. They are based on previous prestigious brands, such as videogame players (*Play Station 2*, *Dreamcast*, *Xbox*), TV programs or channels (*MTV*, *Cartoon Network*, *Operación Triunfo*) or even popular TV stars (*AR, la revista de Ana Rosa*). The underlying logic of those strategies lies on decreasing the positioning cost of a new title in the market. At the same time, companies try to make brand awareness easier for readers, considering the hard battle necessary to conquer a place both at the newsagent shelves and in the public's minds.

iv) More than fifty per cent of new launchings are published on a monthly basis. Reasons behind this trend include the fact that readers look for quality, strongly analytic, non-current affairs products. Updated information is not any longer a competitive advantage for magazines, which have diminished this ability against other media, such as the Internet or highly specialized television channels. In most cases, readers have not that much time, money or interest in reading weekly magazines.

v) Among the main systems to defend market share, licensing has a higher percentage of success than launching new titles. But launching is more frequent than licensing. It happens mainly because it is a cheaper way to get into the industry. It can be stated as well that there is a limited amount of international formats and titles to be adapted to foreign territories. One more reason for the prevalence of launching is that copyright protection is not that strong in the print

media, at least when compared with film, broadcasting and music industries, where formats are protected by international law. Accordingly, some new launchings are inspired on other concepts or formats, even though they are not getting a license from the original publisher.

vi) This analysis implies that the Internet has become the main rival for the magazine industry. Competitive advantages of online services are based on a high level of specialization, continuously updated facts and figures, and free access to most of the contents. But, at the same time, the Internet can be an opportunity as well for Spanish magazine publishers, well beyond using the web just as a promotional tool. New multimedia business models should be explored by publishers in order to maximize the brand's potential. The brand can be useful so as to sell editorial content, advertisements, and products related to the magazine's segment. The objective should be based on turning the publication magazine into the center of a certain community of specific interested people on a highly particular topic.

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Beyond Traditional Spanish Language Media:
Alternative Methods in Creating Integration in a Mature
US Hispanic Market

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Introduction

Over the last decade, the Hispanic population in the US has grown exponentially. Population estimates from the US Census Bureau state that there are more than 44 million US Hispanics representing almost 15% of the total US population, thus one out of eight Persons in the US is Hispanic. In addition to their sheer number, Hispanics in the U.S. have a spending power of almost $750 billion annually.

This rapidly growing segment of the consumer population has been captivating corporate America's attention. As a result, there has been, and continues to be, a high demand for Spanish Language Media outlets to reach the U.S. Hispanic. Spanish Language Media is now an integral part of the general market media mix as advertisers look toward this lucrative market.

According to an article posted in Hispanic Market Weekly, Advertising spending during the first six months of 2006 increased 5.1% over the same period in 2005. Despite the decline of overall ad spending in 2007 due to U.S. economic concerns, Hispanic ad spending is still on the rise. In November of 2007, Nielsen posted on HispanicAd.com that total ad spending for the first half of 2007 is up 2.3% over the same period in 2006.
The principal drivers were Internet, Spanish-language television and national magazine spending.

Advertising Age noted in their Hispanic Fact Pack, that the 500 largest US print and television advertisers' Hispanic expenditures surpassed $5 billion in 2006 - an increase of 42 % since 2003. So there is no doubt that as this population increases, so does the list of key brands that want a piece of the pie and thus emerge more media outlets to fulfill the marketing needs. Research by both Advertising Age and Nielsen reveals the largest advertiser categories targeting the Hispanic market are automotive and wireless telephone services.

Hispanics consume all facets of media in their daily lives and the growing Hispanic population makes it a more complex media mix as options continue to grow as do the number of Hispanic Internet users. The majority of growth in Hispanic media is online offerings, events and promotions.

This report will highlight some facts and research about Hispanic Internet growth, user trends, as well as promotional opportunities to reach this ever growing and mature audience.

Spanish Language Internet

There is no question that Internet usage in general has changed the world as we know it, and now without any thought, anytime anyone needs information, they look to the Internet for a solution. Whether it is on their cellular phone or other mobile device, information and technology is now at the world's fingertips.

There is no exception to the Internet proliferation with the U.S. Hispanic. The U.S. Hispanic online market is the fastest growing segment online as described by Nielsen. As the group's population increases, so too will the need for more target specific Internet services. Strategies and tactics in U.S. Hispanic media today should include website development and online marketing. And for companies looking to reach more affluent U.S. Hispanics, online offers a cost-efficient opportunity when compared to traditional radio and television advertising.

Some companies and advertisers have underestimated Hispanics Internet usage, thus not offering Spanish language versions of their websites. According to Advertising Age, what they have overlooked is that approximately 65% of U.S. Hispanics own a computer - a very high number for a group who have until recently, been underserved by the online world. And with the growth in Hispanic Internet usage, online video advertising is growing at a rapid pace with increased brand awareness.

Spanish vs. English Online Content

There have been many arguments among industry professionals as to the importance of Spanish language offerings online. Some have argued that those U.S. Hispanics that have access to a computer speak English so why the need for in-language content?

At the Search Engine Strategies Latino Conference and Expo in Miami in June, 2007, Spanish vs. English online content was discussed. Portada.com reported on the event releasing some interesting research that Google shared with the group on Internet content and the Hispanic market:
- Spanish content must be unique and relevant
- Spanish performs at a higher level than English
- Spanish appears more authoritative
- US Hispanics skew younger with smaller households and 49% speak Spanish fluently.
- Hispanics online are more usage intensive with 25% more pages viewed daily and spending 20% more time online than the General Market
- 61% of US Hispanics own cell phones

Forrester Research reports that many popular sites such as MySpace, YouTube, Itunes and Wikipedia offer Spanish Language options to reach Spanish dominant Hispanics, while Spanish language specific sites like VoyMusic, Batanga,

PlanetaTV.com and VoyTV.com are holding their place in the top 10 most visited sites by Hispanics.

Based on population growth and buying power, U.S. Hispanic specific content is still lacking. But advertisers and media groups are continually looking for new ways to reach this consumer and quickly, leaving a lot of room for growth for new online properties.

Spanish Language Online Content Growth

Hispanics surf the web for many different reasons. Market researchers have created four prime categories of Hispanic usage, which include information, entertainment, financial transactions and communications.

According to Advertising Age's annual Hispanic Fact Pack published in June of 2007, ComScore Media Metrix ranked the Top 10 most visited web properties among Hispanic users. The top five reported on the list were Yahoo! Sites, MSN Microsoft, Google, Time Warner and eBay.   ComScore Media Metrix is the industry leader in Internet measurement and ranking.

2007 has presented many new Hispanic targeted website offerings, with a variety of content and services. A report on Portada online in June of 2007 lists many new online initiatives from health related social networking sites, banks and financial web portals to larger more main-stream sites such as MySpace and BabyCenter®.

The launch of ClickOcio.com, meaning "ClickLeisure" in English in 2007, provides U.S. Hispanics the first 100% Spanish language consumer site selling airplane tickets and Broadway theater tickets.

BabyCenter, the largest online resource for expectant and new parents globally, launched BabyCenter en Español as well in 2007. In a recent interview on Hispanic PR wire with Isidra Mencos, Editor and Chief of Baby Center en Espanol, said, "BabyCenter en Español was conceived to deliver relevant content in Spanish, geared specifically for Hispanic Moms who are online."

Internet TV is also an important revenue driver in US Hispanic media. For Terra, one of the largest Spanish language online portal companies, Internet TV generated 17% of their online advertising revenues in 2006. Terra has more than 8 million unique visitors per month and offers a variety of services and resources . Fernando Madeira CEO of Terra Networks says, "Our forecast for the end of 2007 is to achieve 25%."

Telemundo is trying to capitalize on the popularity of its telenovelas by repurposing their content on their website by creating discussion forums around the programming where viewers can exchange feedback, commentary, download clips, and view excerpts from the shows.   Additionally, Telemundo is introducing interactive ways for engaging viewers to with their programming online. They are inviting people to send in videos interpreting some aspect of the popular hit telenovela, Zorro through song, dance, or other interpretive form and posting it on the website.

In 2007, Univision also launched a video portal on Univision.com, where users can access clips from their TV shows, celebrity interviews music videos and news clips. They are also launching a social networking service in addition to a wireless video subscription service through their new mobile initiative, Univision Movil.

However, Univision does not stop there, they have also created a Web-only novela, co-produced with Unilever, featured Unilever's Caress body-care brand following extensive Unilever research to tap into a growing young Hispanic female audience and consumer group.

Hispanic Youth Online

In an article published on Portada.com, a leading Spanish language Internet research and blog site, it states that Hispanic teens have an affinity toward cutting edge technological features. The fastest-emerging platform to reach them is via mobile marketing.

Research by MTV network's Slivered Screen Research demonstrates that 63% of Hispanics in the US own a media-capable cell phone and are 23% more likely to use them to watch video content and programming than the general population. That is very high compared to the non- Hispanic percentage at 46%.

Responding to such compelling data, MTV Tr3s has launched a multi-carrier, bilingual mobile channel for Hispanic youth in March, 2007 with ringtones and video content from hot Latin artists.

Social Networking and Blogging

Social networking among all adults has become a popular phenomenon. A report by Forrester Research indicates that social online networking among Hispanics tripled between 2005 and 2006. The report demonstrates that half of online Hispanics are involved in at least one of five social Internet activities, including blogging, personal Web pages, and involvement on discussion boards. According to the study, MySpace is Number one with 31% of Hispanics visiting at least once monthly.

Another interesting growth mechanism on the Internet is blog sites and 'blogging.' Scarborough Research reported recently that Austin, TX, Portland, OR, San Francisco and Seattle are the top markets for people who read or participate in blogging activities. According to Scarborough's findings, these cities are the leaders because they are youth driven and tech savvy. Interestingly enough, half of these markets are heavy Hispanic growth markets. So it is no surprise that new research is being conducted on Hispanics and their blogging.

What about Hispanics that do not use the Internet?

A recent study conducted by the Pew Hispanic Center indicates that a lack of access is the most prevalent reason for Hispanics not utilizing the Internet with 53% of the respondents claiming they do not have Internet access available. Interestingly, only 6% percent of the respondents claimed cost as a barrier. The study also indicated that about 1/5th of the respondents claimed that they are simply not interested in accessing the Internet. That leads industry professionals to believe that there is a great lack of relevant and compelling content to engage them.

Grassroots and Promotions

With the rising costs of traditional media advertising, marketers and advertisers look to alternatives to reach the Hispanic consumer. In addition to new online opportunities, promotions such as events and grassroots initiatives are increasing as this Hispanic market matures. Companies and advertisers are looking for innovative ways to reach this consumer in a more personal and engaging way.

When dealing with the Hispanic market, all marketing, media and promotional efforts must be culturally relevant and the general message must connect with the consumer. Complete integration of the strategic platform is crucial to implementing successful promotions within the Hispanic Market. Although event marketing and promotions seem to be an inexpensive way to market a product/service to the Hispanic consumer, it takes a lot of planning to create a cost-effective way of reaching a consumer with direct person-to-person contact.

What may be saved in production and media expenditures, is lost in site fees, staffing and management of the project. Site fees for an event can range anywhere from $1,000 for a 10' x 10' booth space in a small event in Boise, Idaho to upwards of $100,000 for major events and title sponsorships in Los Angeles, California.   Title Sponsorships generally come with large pavilion space, signage and media support. Grass-Roots promotions and events are very labor intensive and staffing cost can quickly escalate. However, an efficiently planned, timed and executed event can be quite cost effective. There are a few companies in Hispanic Media that offer this niche service such as GMR, Dieste and Marketration, but there is scope for many more. Industry leaders forecast a large growth in Promotional efforts pertaining to the Hispanic Market over the next several years.

Promotional efforts can pay off well in the long run - better than traditional media when correctly planned and executed. A media impression only lasts so long and then it is forgotten, but a personal connection with a brand, through grass roots promotional efforts, can last forever.

Measurement of event success is the same in the Hispanic Market as the General Market. Some event marketers hire a research group to be on-site to capture opinions and gather information. Some promotions are measured by using traffic monitors to count foot traffic to generate total brand impressions at an event. Others try to link the promotion back to their retail locations and measure results by coupon redemption, prize registration or sales spikes.

For online promotions and offers, measurement is provided by the number of hits to the site and/ or how many new registrants there are to the site. Local Hispanic celebration events, see below, offer prime locations for executing promotions on-site to large masses of Hispanics quickly.

Participation in local celebrations within the Hispanic market is recognized as community involvement with continuous one on one consumer contact and is important to brand development/loyalty with the Hispanic consumer, and no one is a more loyal consumer with a high word of mouth ratio than a Hispanic consumer.

Premier Hispanic Events

There are hundreds of events nationwide ranging from brand custom events to

community events. The following events traditionally attract the largest numbers in the major markets:

The Puerto Rican Day Parade in New York City was established to create an awareness and appreciation of the culture in addition to its contribution to society in the US, while promoting the study and advancement of Puerto Rican culture and arts nationally. The first New York Puerto Rican Day Parade was held in 1958 in Manhattan. Held each June, the festival has grown from a local parade into the largest Hispanic parade in the US. Estimates state that more than 2 million people were present in 2007 making it the largest outdoor cultural event in the US.

Calle Ocho is another annual event held in Miami in March. This festival has grown from a neighborhood block party into the largest street party and biggest Hispanic bash in the US. More than 1 million visitors with the Kiwanis Club of Little Havana celebrate this one-day event, stretching out for 23 blocks. Dozens of Merengue, Salsa, Pop and Caribbean musicians perform on more than 40 stages and just about every major brand has a visible presence.

Cinco de Mayo is an event that is prominent in the Southwest region of the US. On the morning of May 5, 1862, Mexico triumphed over the French in the Battle of Puebla, Mexico. Celebrated by Hispanics of both Mexican origin and the general population, Cinco de Mayo has been adopted in the U.S. as the first official Hispanic celebration for both the general and U.S. Hispanic markets. It has become a festive party with live music, food, and activities for the entire family.

Diez y Seis de Septiembre is another event that is held annually and is prominent in cities with large numbers of Hispanics of Mexican origin. Mexicans celebrate this day as their official Independence Day. Mexico declared its independence from mother Spain on midnight, the 15th of September, 1810. Every major Mexican market has a traditional Mexican Independence Day festival.   Much like Cinco de Mayo's festive party atmosphere, but with a historic Presidential address re-enactment of a freedom speech known as "El Grito," it is then the crowds chant, "Viva Mexico."

Where once there were only a few neighborhood businesses, food vendors and musicians at these events, they are now heavily sought out by Blue Chip clients who want to tap into this rapidly growing consumer base. Major media groups such as Univision, Telemundo, Azteca America and every Hispanic radio group in the country work with event producers to create a personal relationship with their viewers and listeners. Most Hispanic events are visited by the entire family, so participating in these events really reaches deep into the home, and communicates on a personal level with people of a variety of ages in one location.

Conclusion

In summary, this research proves there is tremendous growth opportunity within the Hispanic market for new media such as online offerings and integrated promotions. Promotions and online go hand in hand in delivering an effective platform to reach this niche audience. Most Spanish language television and radio stations utilize their online websites to promote their events, programming and contests.   Univision radio and television are a good example of that.

Additionally, it is a diversified marketplace as television and radio options continue to grow and marketers are seeking new and innovative avenues to reach U.S. Hispanics.   As lives in America continue to become more hectic and people spend less time in front of the television and more time online, marketers will continue to move toward a digital approach.

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Digital Storytelling as a Culturally Relevant Pedagogy for Latin@ Students

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The educational horizon for young Latin@s is unfortunately rather dismal. As Latin@s navigate the educational pipeline, in other words, as they engage with the connecting institutions, practices, and discourses that make up the U.S.' educational system, Latin@s experience the lowest rates of attainment and performance (Yosso 2006). Out of 100 Latin@ students that enter elementary school, 56 drop out of high school and 44 graduate, 26 of these high school graduate continue to community college or a four year institution, only two will earn a graduate degree and less than one will receive a doctorate (Yosso 2006).

To explain these serious leaks in the educational pipeline many educators and policy makers blame the culture of Latin@s assuming that Latin@ culture is deficient or at best incongruent with educational success (Foley, 1991; Olmedo, 1997). Despite this researchers have learned that the educational failures of Latin@s are not about students that can't succeed rather their consistent and alarming rates of failure are the result of expectations, beliefs, and practices that do not recognize their potential to achieve. In other words, the educational failures of Latin@ students are not of their own making. Latin@s do not lack knowledge or values relevant to education, rather, the knowledge they have accumulated from their families and communities—funds of knowledge—is consistently disregarded in their schooling (Moll, 1992).

Like many young people, young Latin@s also increasingly rely on media and technology to communicate ideas and experiences relevant to their generation. However, when it comes to youth media is often regarded for its negative impact rather than positive potential. In this paper we argue that media technology can be used as a powerful pedagogical tool to incorporate the cultural assets or funds of knowledge of Latin@ students into school and college classrooms. Specifically, we will describe our observations of a three day workshop to illustrate how digital storytelling can be used as a tool to harness the funds of knowledge of Latin@ students.

The Cultural Role of Stories

Stories are culturally important or culturally relevant because they inform identity and create a sense of cultural membership. Stories are involved in the cultural construction of the self (Cook-Gumperz, 1993; Miller *et al.*, 1990) because stories convey to others something about our values and about how we view the world. Stories communicate values that hold people together through their narrative structure. For example, according to Collins (1985) the stories of African-Americans, Hawaiians, and American Indian groups from the U.S. have a "strongly dialogic quality." Storytellers from these cultural groups rely on audience response to direct the unfolding of narrative events. In contrast, among non-minority middle class groups narrative events have a "monologic quality." Overt audience participation is downplayed because the narrator is expected to construct and comment on the narrative (Collins, 1985).

This cultural role of stories has implications for educational practices. Understanding narrative styles can promote respect for different ways of telling stories and value alternative literacies as legitimate (Nichols 1989) forms of teaching and learning. Paying attention to these cultural differences creates a space for the inclusion of students' voices in the classroom (Knight *et al.*, 2004; Yosso, 2006; Knight et al., 2004; Ladson-Billings, 1999). For example, Rina Benmayor combined digital storytelling with Chicana feminist theory in her Latina Life Stories college course to allow students to author and theorize their life stories (Weis *et al.*, 2002). Benmayor found that the use of media technologies or cyber-teaching transformed her college course into a more interactive and collaborative learning experience (Benmayor, 2000), a more dialogic class. Finally, acknowledging the cultural role of stories challenges educational practices informed by explanations of educational disparities that rely on cultural deficit (Dyson & Genishi, 1994; Yosso, 2006). For example, Knight, Norton, Bentley, Dixon (2004) researched the college going processes of Black and Latina students from New York City. The stories told by Black and Latina youth emphasized the importance their families played in their decision to go to college. These stories challenge stereotypes of Latin@ parents that assume that they are uncaring, unsupportive, and indifferent about their child's education. The project we present here draws on the relevance of stories for Latin@s through the use of digital media.

The Project

We worked with the Center for Digital Storytelling (CDS) and the Center for Spanish Language Media at the University of North Texas to facilitate a workshop about digital storytelling. CDS is a non-profit organization based in California that focuses on training, research, and development for the purposes of using digital media to tell stories.

We decided to work with CDS because of its extensive and pioneering work and because its practices are guided by some of the principles that provide the scholarly and applied backgrounds of this project. The work of CDS is relates to the following core values: 1) everyone has a story to tell, 2) listening is hard to do and workshop participants are challenged to "listen deeply," 3) because we see, hear, and perceive the world in different ways the approaches we take to tell our stories are also different, 4) human activity is creative, 5) while computers are often poorly designed, technology can be a powerful instrument for creativity (Principles, 2007).

The three day workshop took place the University of North Texas and was facilitated by Gayle Nicholls-Ali an experienced educator and award winning photographer born in Barbados and raised in Brooklyn. The participants included one Latina college student, one Latino high school student and two researchers. Participants produced a total of five digital stories, including one by one of the authors' young sons.

We relied on ethnography for the collection of the data and analysis. Media technology was incorporated through digital storytelling since Photoshop, Adobe Premiere, and digital audio recording technology were used in the production of the digital stories. We observed Latin@ students while they participated in the workshop and conducted a video taped open-ended interview at the end of the workshop. The workshop ended with a screening of the participants' digital stories and a celebration. Alicia's family joined the screening along with a reporter from the Spanish TV station Univision. The reporter interviewed the participants for a local news report that aired that evening. Everyone present at the screening was moved by the digital stories.

Findings

During the interview we asked Gloria and Roberto (names are pseudonyms), the Latin@ students, about the workshop, Gloria responded, "…it was physically and emotionally draining 'cause we had to use every part of ourselves to work on this project." This emotional and physical labor work makes digital storytelling a culturally relevant tool.

The story circle is where the emotional work involved in the pedagogy of digital storytelling begins to unravel. As Gayle explained, "this is the part of the workshop where we really workshop." For Gloria the emotional work of the story circle had to do with the "self-analysis" participants have to do in order to "get the story out." Roberto characterized the discussion of the script during the story circle as "hard" and explained that the difficulty had to do with trying to tell a "really deep story." The use of dialogue allowed participants to learn about each other while also realizing that they had a story worth sharing.

The physical part of the workshop involved writing the script and using digital technology. Gloria described this aspect of the workshop as using "all of our brain to put the material together.'' Roberto wrote his script from the perspective of a son writing a letter to his missing dad. He used photographs of his friends and a video re-creating a car incident to communicate the role of friends and his transformation into a responsible young man while enduring the pain of growing up without his father.

screen shot of Roberto's digital Story, Dear Dad

Gloria wrote her script from the perspective of a college student asking herself the question, who am I? She used photographs of Mexico and a video of herself. To illustrate the border crossings that shaped her identity, Gloria began her story by letting the audience know that she takes her iPod everywhere she goes.

screen shot of Gloria's digital story, My iPod

Photographs, video, music and voice-over narration of the script were edited with the assistance of digital technology. In this way various forms of media were used to help the audience relate to the story without necessarily having to hear commentary about it. This was particularly useful in the case of Gloria's reflective story about her Latina identity. Thus, as Gloria and Roberto used their intellect to put it all the pieces of a digital story together they learned, as Gloria explained that, "Other people can identify what you're going through," the process "makes you think a lot…'cause even though it's your story you know it represents other people." Ultimately these students learned about themselves, about technology, and about the importance of sharing their experiences from their own perspectives.

Applications and Future Research

The combination of storytelling and technology found in digital storytelling can be used to develop educational practices that incorporate the funds of knowledge of Latin@ communities. Weis, Benmayor, O'Leary, and Eyon (2002) used digital storytelling in their courses about oral history. They found that "the digital storytelling form authorizes them [students] to lay claim to their own histories, their own voice, and to use primary sources in authoritative ways" (Weis et al., 2002 p. 154). In the case of Gloria digital storytelling "..reaffirmed the fact that I am Latina because, uh, it took me back to the beginning of it all." For Roberto the pedagogy of digital storytelling made him think that "Many other Latinos are just people in general that can relate to my story in some kind of way." In the case of digital storytelling the dialogic method allowed participants to learn about themselves and each other through sharing and interaction. The use of media technology to bring together written narratives, oral narratives, images, sound, and visual effects provide digital storytelling with a versatile holistic quality to tell, share, and research the funds of knowledge of Latin@ students. For these reasons, we suggest that future research and interventions about Latin@ education include a digital storytelling praxis—the use of media technology and stories to reflect (research) and change (act upon) the educational lives of Latin@ students.

While teachers and schools have experimented with digital storytelling at the elementary and high school levels (see http://www.coe.uh.edu/digital-storytelling/) we are not aware of studies or programs specifically targeting Latin@ students in K-12. Given the findings of this study we would like to bring digital-storytelling workshops to schools and classrooms with a significant number of Latin@ students such as in Dallas, Arlington, and Denton, TX. In addition, digital storytelling can be incorporated into educational studies about Latin@s who have migrated to countries other than the U.S. We are currently collaborating with colleagues from Europe in a study about intercultural education that involves Latin@ students from Central and South America who are currently residing in Spain. Many of these students experience the isolation, racism, and the educational disadvantages faced by their U.S. based counterparts. Digital storytelling could be used to document these similar experiences and to promote transnational communication between educators, professionals, and families involved with these students.

Digital storytelling can be introduced to teachers through teacher development and teacher preparation programs in both the U.S. and abroad to help them learn about the experiences of Latin@s in their schools and communities. In addition, digital

storytelling can be added to existing classroom curriculum about Latin@s or can be introduced to develop such a curriculum and promote more interactive learning. Specifically digital storytelling could also be used to develop courses about Latin@s at the high school level and can be integrated into existing Latin@/Chican@ Studies programs.

As an applied research tool digital storytelling also lends itself to interdisciplinary collaboration. The digital storytelling praxis we propose can be enhanced by collaboration with colleagues with expertise in media technology and storytelling. The dialogic and technological aspects of digital storytelling require expertise in such areas. Projects focusing on digital storytelling and Latin@ education can be enhanced by collaboration among researchers with various skills and knowledge. In addition, digital storytelling could be used to facilitate the incorporation of Latin@ students as co-researchers and even as peer mentors to other students. In this sense digital storytelling can help bridge the gap that often exists between researchers and research subjects, teachers and students, adults and young people. Digital storytelling can enhance deep collaboration and dialogue so that the skills and knowledge of young Latin@s are valued and cultivated in order to support their educational success.

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ARTICLE

Management style and internal communication.
The case of media managers in Colombia

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Abstract

This research examines the dimensions that define the management style and the internal communication in a group of Colombian news media. The first part exposes the theoretical elements of the study, a revision of the way in which the dimensions of the style and internal communication are presented in literature about media organizations and the aspects that are relative to the business performance of Colombian journalism media. The second part covers the methodology followed for the field work, the research results, and their corresponding analysis. The methodology includes the elaboration of interviews with managers of news media, based on a questionnaire with closed questions.

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Introduction

Research on the management processes in media companies has been intensified over the last years, as the communication conglomerates have gained strength (Albarran, 2006). Since it is a sector that involves entities that work with a variety of products and are organized in a different way, it is difficult to establish general theories about how to manage them; nevertheless, considering the effects that the media can have on society, it is justifiable to contribute knowledge in order to build a study discipline that is focused on the subject (Mierzjewska & Hollifield, 2006).

In the case of the Colombian information industry, research on the sector is pertinent for several reasons: a) there have been scarce studies done in the country that are relative to the management of these type of companies; b) the complexity of the social, economic, and political issues lived by Colombians, forces to have media that is based on principles such as information pluralism, independence, and the privilege of common interest, objectives that can be reached in an environment that grants conditions for the fulfillment of free press and enterprise; c) in the latest years, as it has been happening in the rest of the world, there have been significant changes in the organization structures of the communication media of the country; such changes are a consequence of technological and economic transformations, which leads them to operate with multiple supports and in different geographic regions, and to include useful management models in order to service the administrative support needed of different business units;   d) the proliferation of new media and the struggle for audiences are making commercial logics displace service ones in decisions referring to contents (Cebrián, 2001; Bogart, 2003); d) the Colombian spending in the telecommunications sector has increased in the last decade, specifically in the areas of mobile telephones, internet, and cable television (Comisión de Regulación de Telecomunicaciones, 2007), aspect that makes the sector attractive for capital investment.

This series of situations pose the need to revise the way in which the management groups of the information companies carry out their work in order to make effective processes such as the organization change, establishment of fluid relations in complex organizational structures, as well as the support given by the administrative areas in contents management. These topics are susceptible to be examined under the light of management style, concept that covers a series of dimensions, which, applied to the sector, contribute knowledge about critical aspects of the managerial function.

In order to start this analysis, the reference is a model that enables to study the dimensions that define the management style and relate them with the internal communication processes (Preciado, 2007). The model is useful because it highlights the importance of the management style at the time of understanding the formal and informal organizational structure and offers an explanation about the influence of the managerial behavior in interpersonal relations.

The article begins with the definition of the concepts of management style and internal communication, and the dimensions that constitute them. Then it presents the elements that define the news media sector in Colombia and exposes the methodology followed in the field work, which is based on the realization of semi-structured interviews, held with a selection of managers of information companies of the country. The final part includes a series of conclusions.

1. Management style and internal communication

The reference model for this analysis (Preciado, 2007), defines style as a manifestation of individuality, associated to personality, and is based on the ideas that the directive has about the disposition of people towards their work. This ideas guide the behaviors of the directive in the different roles that he plays and determine aspects such as the motivation systems and decision making that he recurs to. It also states, that the style is affected by the social, political, economic, and cultural environment of the time, as well as by the internal environment of each organization.

The ultimate goal of style consists on influencing the collaborators, since the acts of the directive are guided towards the search for work effectiveness and to favor the fulfillment of the organizational purposes. This influence has its place in relations, because these involve an exchange process in which the personnel reads and interprets meaning in managerial behavior, aspect that enables to establish the bonds between the concepts of management style and communication.

According to this definition and considering the variables used by management style studies in literature about business administration, the constitutive dimensions of this concept are the following: source or nature of the authority, motivation systems used, model that supports decision making and the temporality covered in planning. An addition to these dimensions is the internal communication, which is constituted in the mean that enables the management style to be explicit. Each one of these components is analyzed hereafter.

1.1 Source or nature of the authority

Considering that the dimensions that define the management style are those that enable the directive to exercise influence, the first element that must be considered to analyze the concept is the source or nature in which the directive bases his authority. This can raise from the use of a sanctions and rewards system, in which the directive makes his formal authority prevail, or, by means of the identification with purposes and values, an option that enables the collaborators to follow the authority because they themselves have decided and not because others demand it of them (Haslam & Platow, 2001). The existence of values and the common share of these have been signaled as the previous step for the implementation of an influence system based on identification. Since values are something that is done and not said (Larkin y Larkin, 1994), these are only perceptible in the acts of people.

When the frame in which authority is analyzed is the information business, it is precise to mention the values that rule the journalism exercise, which are based on the defense of the common interest. As well as on other types of organizations, where these are mostly introduced by the founders of the company and in this sense it is stated that "…the particular conception that the promoter of the informative company has about mankind and life (…) will be latent in the inspiring principles" (Tallón, 1992, p. 135). At the same time they contribute unity (Echeverri, 1995; Iglesias y Blanco, 2004), these principles enable to distinguish the information company from others that operate in the same environment, and give transparence to its labor (Nieto e Iglesias, 2000; Iglesias, 2003).

Considering the power division that appears in the managerial function of news media, it may be complex to find that those who are the managers and those who direct the contents area reflect those same values in their interactions. This raises the urgency that news media should have unified principles, which guide the corporate acts (Arrese, 2006).

1.2 Motivation

A second component of style is motivation*,* understood as the reasons that the directive proposes to his collaborators for work. Different studies have shown that the satisfaction of needs is one of the reasons that move people (Herzberg, 1968; Maslow, 1991), which is why the directives, in concordance with the different types of needs that they perceive among their collaborators, decide for one or another form of motivation. This can be of extrinsic character, when they are foreign to the job, and intrinsic, if the performance of the work is the factor that generates the satisfaction of the employee.

The most common researches about personnel motivation in media companies has been centered in aspects relative to the satisfaction of the journalists (Mierzjewska & Hollifield, 2006). They are described as idealist people, with independence of thought, that are not used to follow orders, and with a strong sense of authorship of the work that they perform, factors that lead them to defend their decisions, to not be able for team work, and to be very critical about the decisions made by their bosses (Redmond, 2006). According to this, the direction must be guided to motivate these people to start from the satisfaction of needs of high order, assuming not only the differences that are determined by the specific job, but also the ones derived from the personality and the condition of each individual.

1.3 Decision making

One of the most analyzed dimensions in the style typologies proposed in management literature is decision making. The authors that consider it defend that the degree of participation that the directive gives the collaborators, depends on the concept that he has about them (McGregor, 1987; Tannenbaum & Schmidt, 1958; Likert, 1966). This way, the more positive the opinion, higher will be the possibilities that the directive delegates decision making.

The studies about communication companies include centralized and participative models for decision making. Echeverri (1995) shows a classification that covers the authoritarian and participative styles, and in third place, the schemes in which the direction is able to adapt itself to the ambiguousness of a situation and do what the moment demands, in the way that situational or contingent models operated.

Nieto and Iglesias (2000) propose that participation is a decision making model that is appropriate for journalism companies since, among other advantages, it is centered on the person, it is guided to achieve a harmony of interests and helps the promotion of shared responsibility.

When the journalist media determines that they handle two businesses and generate autonomous structures for each one of them, they are making an effort to decentralize decision making and respect the issues that compete to each one of these structures. For Tallón (1992) the differences between the director of the journalist company and the publication director are clear. The first one is the one who defines the strategies and plans of the organization, as well as the positions and functions, and carries out the personnel selection. Even though he is in charge of the administrative aspect, he also supports the development of the journalism and production functions. The publication director, on the other side, assumes the responsibility about the contents, confirms the editorial policy of the media, has a direct relation with editors, journalists, and creative department, and in general, he handles the particularities of information production.

1.4 Temporality covered in planning

Another determinant factor of the management style is constituted by the Temporality covered in the planning systems. This variable introduces difference between the directives that conduct the organization guided towards achieving short term results and those who intend to anticipate changes, by setting their attention in a farther future. Precisely, one of the differences found between leadership and other directive models consists in the leader having the capacity to visualize, and on the other hand the managers are based on deductive planning exercise that does not have change as a goal (Kotter, 2000). We must include in the analysis of this temporality variable that several studies suggest that people with leadership tendency are most likely able to handle uncertainty, this is why they tend to delegate easier and to trust that they will fulfill the vision, even though they do not have tangible proof of it at the moment (Khaleelee & Wolf, 1996).

If considering that at the formulation of the vision, the leader focuses his attention in a far future and bets for an idea or original business concept that breaks the status-quo and transcends the immediate, there can be a direct relationship between leadership and the model of strategic direction, therefore the existence of objectives can be compared to having a vision, and breaking what is established would be equal to the purpose of the strategic direction of "…carrying out *different* activities to the ones developed by the competition or, at least, do the same activities in a *different way"* (Sánchez-Tabernero, 2000, p. 18). It is precise to state that the temporality considered in the planning programs of information companies is located, especially, in the implementation of the strategic direction model, as it is stated by the researches done (Mierzjewska & Hollifield, 2006).

Based on the leadership studies (Shamir, B., House, R. & Arthur, M. 1993; Bennis & Nanus, 1997; Conger, 1999), it can be stated that this is the most adequate style for information companies, for two reasons: a) because leaders maintain a permanent disposition towards dialogue with the diverse groups that have interests on the company; in this case, citizens, advertisers, shareholders, and investors, government entities and political groups, with whom he thoroughly explores the nature of the organization in order to find shared and divergent points of view; and b) because the changing nature of the media forces the imposition of cultures denominated as *adaptative,* in which it is possible to innovate permanently, assume risks, communicate clearly and fluently, to be integral and give privilege to team work (Sylvie, 2003; Pérez-Latre & Sánchez-Tabernero, 2003).

Considering these dimensions as variables that enable to establish differences among management styles in business management literature, the analysis model used for this project defines five prototypical styles: *laissez-faire,* guided towards tasks, relations, leadership and charismatic leadership (Preciado, 2007). This classification serves as a starting point to corroborate the different shades that appear in the managerial practices of information companies. As the model also proposes, these dimensions affect the internal communication process, because they determine the way in which the directive relates with his collaborators.

1.5 Internal managerial communication

Directive internal communication becomes the means that enables the directive to tell his collaborators the relation among values, personal expectations, and the work done. It is defined as the exchange of messages that the directives of an organization establish with their internal publics. Such exchange has two goals: the firs one consists in guiding the group efforts towards the integration of

organizational objectives; the second refers to communication as a means of negotiation between the interests of the directives and the ones of the internal publics, which relates the exercise of influence.

This way, when the goal is to influence through intrinsic motivations, the directive must make a greater effort of explanation and creation of sense, than if he chose the extrinsic. Since intrinsic motivations tend to be intangible, there will be a greater need for the directive that uses them, to exchange messages that make them perceptible. This same logic could be applied for those who direct taking as a reference a vision in which benefits are uncertain and with long term. The same way, to promote personnel participation in the decision making process implies an increase in the exchange of descendent and ascendant messages, to be available for dialogue, and open up to the possibility that the collaborators may influence the directive. Also, the capacity to motivate the employees to accept the vision or the goals of the organization can only be done by implementing actions or programs that favor internal communication.

The communication process is intervened by the communication skills of the directive, the contents of the messages he/she exchanges, the flow or direction taken by the messages, which may be horizontal or vertical, ascendant or descendant; the formal or informal character of the information source, the types of verbal and non verbal expression of the communication means used, which can be interpersonal, printed, electronic, and audiovisual. Also, it is necessary to integrate to the process, the support that the directive may receive from the communications area of the organization.

The same way that other topics mentioned in prior pages, internal communication has been scarcely researched in the information industry, lack that justifies this study. Before the presentation of the methodology used, there are comments of some keys of the Colombian information media.

2. The Colombian journalism industry

Even though they started in different dates and situations, Colombian press, radio, and television have complemented their job of serving the citizens trying to satisfy the needs of information, entertainment, and education. Throughout their history, they have gone from defending political orientations, to become companies that try to balance freedom of thought and economic stability.

2.1 Communication companies and groups

At the beginning most of the media belonged to family partnerships, such as El Tiempo and El Espectador. Then, as years went by, some of them started to create communication groups or became part of economic conglomerates, model that started its consolidation in the 80s decade (Rey, 2006). This is how nowadays; the Ardila Lülle organization integrates RCN Radio and RCN Television to its corporate portfolio. On the other hand the Santodomingo group, which has been the owner of important companies in sectors such as, banks, soft drinks, and aeronautics, has also been the owner of Caracol Radio and Televisión. Currently, they have the ownership of Caracol Televisión and Comunican S.A. an organization of which El Espectador newspaper and Cromos magazine are part of.

Besides compete with organizations of regional press and public media, that are specially focused on the offer of national, regional and local television, these companies compete with others that belong to international communication groups. In 1999 the Santodomingo group sold 19% of the shares of Caracol Radio to the Prisa group of Spain, and later on, in 2004, 100% of the radio network became property of the Spanish group. These negotiations started the consolidation of the presence of international groups in Colombian communications.

Another international group is Telefónica. This Spanish organization first entered as a mobile telephone operator, then, in 2006, it bought 50% of the state communications company, Telecom, for 369 million dollars and currently offers packages of mobile and home telephone services, wide band internet access, and satellite television.

On the other hand, Teléfonos de México, Telmex, consolidated itself as cable television operator as of 2007, by purchasing a group of local companies that granted the service. Today, it manages 54.6% of the closed television in the country. Also, América Móvil, partner with this group, is the first mobile telephone operator through Comcel, a company that has more than 20 million users in Colombia (Comisión de Regulación de Telecomunicaciones, 2007).

In September of 2007, Planeta and Casa Editorial El Tiempo, CEET, closed a deal in which the Spanish group bought 55% of CEET and 40% of the City TV television channel, for 165 million dollars.

In the most important national communication groups it is necessary to mention Publicaciones Semana, which manages Semana, Dinero, Soho, Fucsia, Jet Set, and Arcadia magazine.

2.2 Audiences and advertising investment

During the last years, and as it has been happening in other parts in the world (Cornog, 2006), Colombian newspapers are facing a decrease of readers, situation created by the acceptance of on line free editions and because current society is more visual orientated, and tries to interact more with the information. According to the Estudio General de Medios, EGM (Primera Ola 2007), the reading indexes of the newspapers of the country decreased 10% between 2005 and 2006. Currently the most read newspaper at national level is El Tiempo, and there are also leaders according to the regions, as it appears in *Chart 1*.

Chart 1. Most read newspapers

Newspaper	Daily readers
El Tiempo	1.249.900
El Colombiano (Medellín)	282.700
El Heraldo (Barranquilla)	233.200
El País (Cali)	196.700
El Universal (Cartagena)	182.000

Source: Estudio General de Medios, EGM, Colombia. Primera ola, 2007.

The evolution of the magazine market has tilted the demand scale towards entertainment topics and the frivolities of the national and international events. Even though Semana holds its leadership in the current information sector, other publications that aim towards entertainment contents appear as leaders in this media group.

Chart 2. Most read magazines

Magazine	Number of readers
TV y Novelas	1.131.900
Soho	899.700
Semana	789.700
Tú	603.300
Caras	510.000

Source: Estudio General de Medios, EGM, Colombia. Primera ola, 2007.

Concerning radio audiences, the studies state that in Colombia, musical contents are over information and opinion (TGI, 2007). This is why it can be stated that in the country, radio constitutes an entertainment media over an information media. The radio stations with information contents that have the largest audience indexes are Caracol Radio, RCN Cadena Básica and La W Radio, as it appears in *Chart 3*.

The most intense competition for television audiences is between the two private channels, Caracol and RCN. Followed in rating by the channels offered by cable television operators, as it appears in *Chart 4*.

Chart 3. Audiences of informative radio

Average main cities (Bogotá, Medellín, Cali, Barranquilla, Bucaramanga)

Radio station	%
Caracol Radio	4.80
RCN Cadena Básica	4.22
La W Radio	2.50

Source: Elaborated by the author with information
from Target Group Index, TGI, Primera Ola, 2007. Ibope Colombia.

It is important to mention that Colombia is the second country in Latin America in entrance of paid television, with a total of 1.78 million subscribers, after Argentina (Portafolio.com, 2007). Talking about regional public television channels, Teleantioquia is the one with highest audience levels as it appears in *Chart 5*.

Chart 4. Television channels with highest audience levels

Channel	Rating reached %
Canal RCN	97,36
Caracol	82,54
Discovery Channel	17,06
Animal Planet	15,18
City TV	12,11

Source: Estudio General de Medios, EGM, Colombia. Primera ola, 2007.

Chart 5. Regional television audiences

Channel	Rating reached %
Teleantioquia	10,6
Telecaribe	8,6
Telepacífico	8,6
Telecafé	2,6

Source: Estudio General de Medios, EGM, Colombia. Primera ola, 2007.

The intensification of the competition between telephone companies and television operators explains the noticeable growth of internet in the country. According to the information published by the Comisión de Regulación de Telecomunicaciones (2007), Colombia had, by June of 2007, 10.1 million users of this service, which represents a penetration of 23%, index that surpasses the access measure in Latin America, which is 20.8%. The most visited news media on the internet is eltiempo.com, which recorded a total of 14.377.847 visitors according to the Estudio General de Medios, primera ola 2007.

It must be mentioned that the media with the most advertising investment in the country is television. This way, the total amount paid for advertising in national channels in 2006, was 381 million dollars, the highest number in the history of this media, and 10 million dollars for cable television (Semana.com, 2007), followed by the radio and newspapers. The performance of advertising investment in media between January and September of 2007 is summarized in *Chart 6*.

Chart 6. Summary of advertising investment in media
January - September 2007 (in thousand dollars)

Media	Investment	%
Press	390,272,073	15%
Exterior advertising	53,510,535	2%
Radio	618,995,771	25%
Magazines	105,745,714	5%
National television	925,311,862	42%
Regional television	149,704,931	7%
International television	85,844,388	4%
Totals	2,329,394,274	100%

Source: Ibope Colombia, 2007

3. Methodology

The goal of this work is to carry out an exploratory analysis to determine the way in which style dimensions and internal communication is presented among the managers of Colombian news media.

The methodology used is supported by semi-structured interviews, which have enabled to center the research on common elements, as well as to broaden the information granted by the managers of the journalism companies, in the cases that their answers have required it. The questionnaire used has 37 questions, in present time, in multiple choice formats, and with a grading scale from 0 to 5, and guided towards knowing the appreciations of the managers about their directive and communication practices.

The selection of the media invited to be part of this study was centered in those that produce and transmit news contents and have the highest audience levels of the country, according to the data of the Estudio General de Medios, primera ola of 2007 and the Target Group Index, TGI, primera ola 2007.

The guests were 36 directives of information companies from Bogotá, Medellín, Cali, Barranquilla, Bucaramanga, Manizales, Montería, and Cúcuta, considering that these cities constitute the main centers of political and economic power in Colombia and are the base for the journalism companies that report the highest audience levels.

Chart 7. Sample composition

No.	City	Position	Number of employees
1 2	Barranquilla	Manager of the regional television channel Manager of the regional newspaper	22 320
3 4 5 6	Bogotá	Manager of the national multimedia group CEO of the national radio network General manager of the national radio network of an international group Administrative Vice/president of a national television channel	3.500 1.267 800 829
7 8	Bucaramanga	Manager of the regional radio network Administrative director of the regional radio network	52 30
9 10	Cali	Manager of the regional newspaper Manager of the regional radio	580 55
11	Cúcuta	Manager of the regional newspaper	140
12	Manizales	Manager of the regional television channel	31
13 14 15 16 17	Medellín	Manager of regional radio Manager of regional radio Manger of regional newspaper Manager of the regional newspaper Manager of the regional television channel	130 120 200 550 97
18	Montería	Manger of the regional newspaper	145

In the case of national radio networks there were interviews to the highest directives of the main office in Bogotá and the regional managers, considering that even though they operate in the same organization, the regions have their own information routines and a certain degree of autonomy in the handling of information and the administrative affairs. The national television channels do not have administrative structures in the regions; this is why the interviews were done in Bogotá. There was a similar process in order to obtain information form national newspapers and magazines, which have correspondents, but no administrative structures in the regional capitals. The interviews were done in the months of June and August of 2007. The final sample is made up by 18 directives of 8 cities and companies of different sizes, as it appears in *Chart 7*.

4. Results

This section shows the results of the applied work. The answers are exposed and analyzed in two parts: one is dedicated to the style dimensions and the other presents the elements that intervene in the internal communication process.

The interviewed mangers are between 35 and 60 years old. 11% are women and 89% men. The experience in the sector is from 2 to 35 years and the seniority in directive positions ranges from 2 to 26 years.

4.1 Source or nature of the authority

As it has been stated previously, the organization values that guide the decisions and acts of directives day by day are constituted in dimensions that enable to base authority on identity generation processes. Towards the question about which are the different values of the news media, 64.8% of the interviewed managers mention the ones of the journalism exercise: impartiality, credibility, objectivity, transparence, respect for mankind, and the defense of truth.

The person is recognized as the center of the organization and it is considered that if the employee has high morality standards, that person will be able to transfer those values to the information product. Therefore, the characteristics of the employees make up the second most mentioned group of values, with a 18.5%. These cover the capacity to integrate, for team work, and "serving with passion". Media with public character highlights in this segment: tolerance, non violence, inclusion, and work for peoples rights. In third place, and with 16.7% of the mentions, appear the values of the information product, among them, technical innovation and quality.

4.2 Motivations

The two types of motivation that are valued the most by managers of the sample have been promotions and recognition for job well done, which, in both cases, were graded with 5, by 61% of the interviewed, in a scale from 0 to 5.

Among the intrinsic motivations the most outstanding are the answers favorable towards challenge proposition, the realization of training courses, projects management, and the possibility for employees to work in their areas of interest. The distribution of this group of answers is illustrated in *Graph 1*.

Graph 1. Use of intrinsic motivations
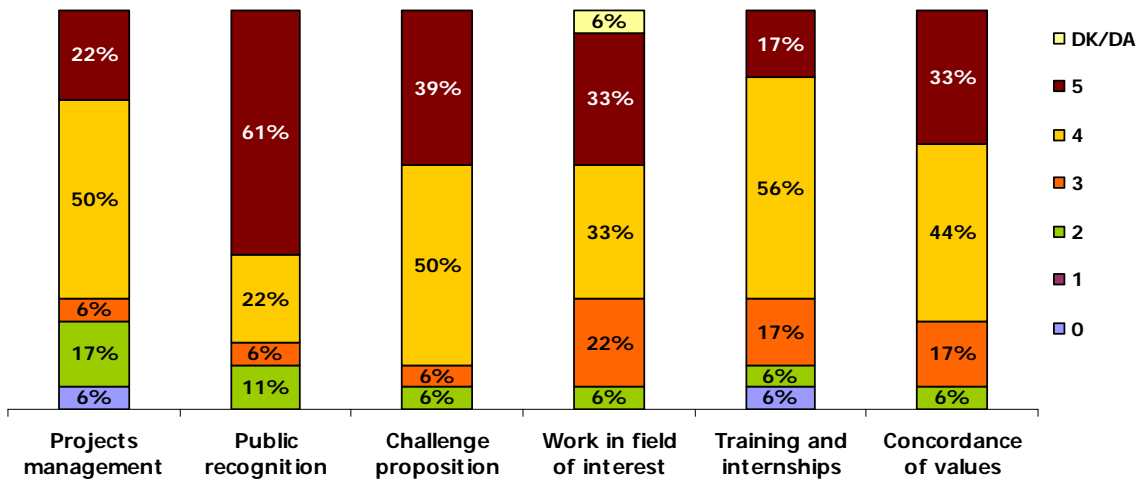
Source: Elaborated by the author

Talking about extrinsic motivations, the answers were more distributed, as it appears in *Graph 2.* This group is made up by actions such as the delivery of incentives for fulfillment, especially guided towards commercial and sales personnel. Journalists receive bonus payments, even though it is accepted that these are scarcer each time and are granted only in exceptional cases. In multinational companies, the decision about increase of salaries or granting additional payments is taken by the main office, therefore the regional manager is limited to recommending when and to whom these should be given.

Graph 2. Use of extrinsic motivations
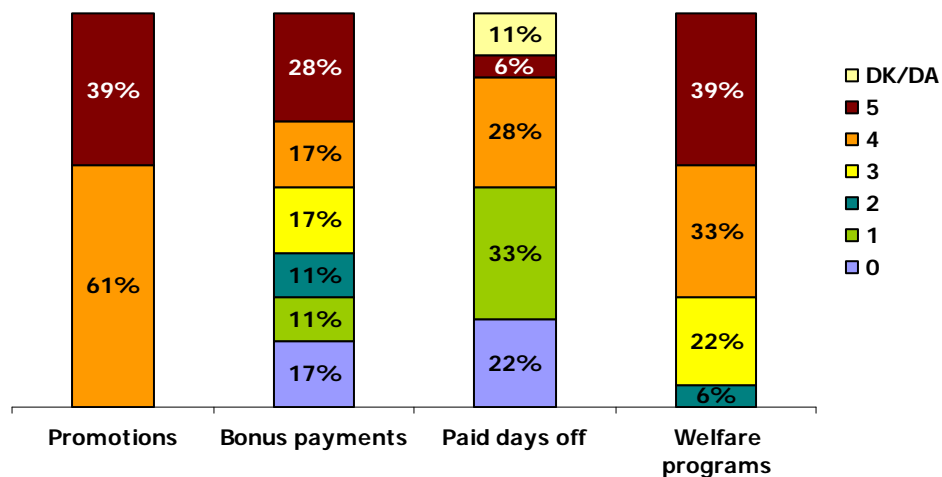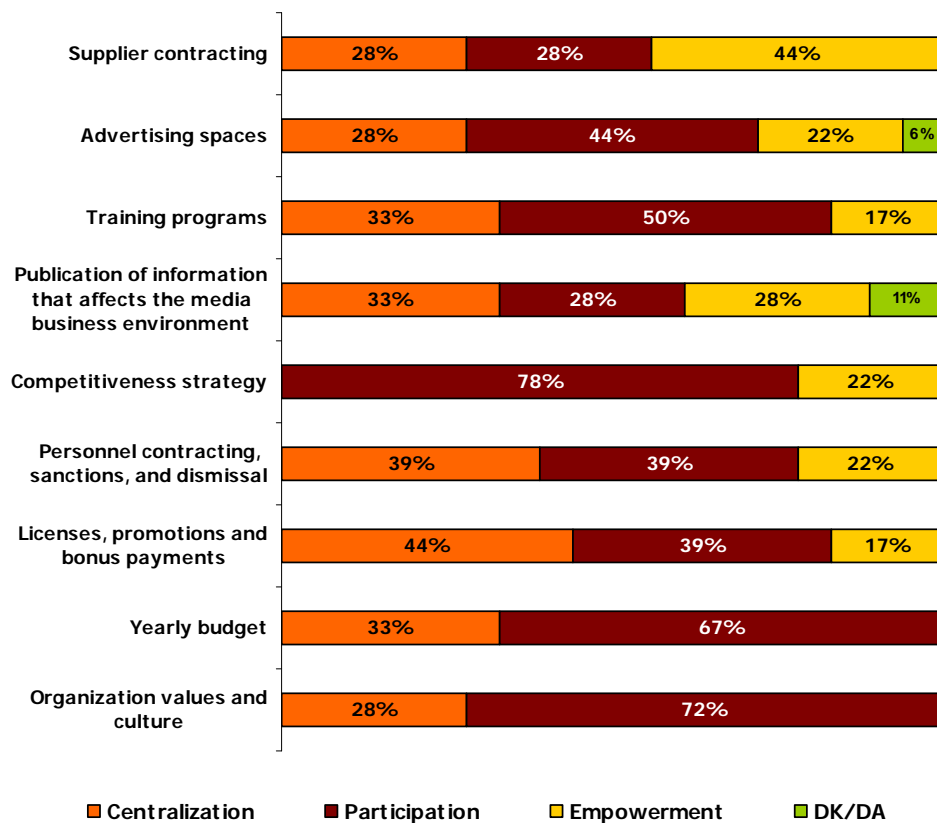

Source: Elaborated by the author

4.3 Decision making

        In order to analyze the levels of centralization in decision making it is necessary to consider aspects that add complexity to this process in information companies. The most outstanding are the size of the organization, the belonging to communication groups, the different command levels present, and the aforementioned power division. This way, in 72% of the cases it is stated that the management and direction of contents maintain coordination relations. The management and, in general, the administrative areas, make decisions and grant following to the journalism areas concerning payment, employment systems, and the contents of the training programs that they offer.

        In small media, especially regional newspapers, there are cases in which the same person takes care of the management and contents direction. This is why it is logical that decision making tends to be centralized. In group owned media, centralization is understood as the decisions made by the chief executive officers or the general management, participation as those decisions made between this office and the directives of the regions, and *empowerment* as the decisions made in the regions, without consulting the main office.

Graph 3. Model followed for decision making

	Centralization	Participation	Empowerment	DK/DA
Supplier contracting	28%	28%	44%	
Advertising spaces	28%	44%	22%	6%
Training programs	33%	50%	17%	
Publication of information that affects the media business environment	33%	28%	28%	11%
Competitiveness strategy		78%	22%	
Personnel contracting, sanctions, and dismissal	39%	39%	22%	
Licenses, promotions and bonus payments	44%	39%	17%	
Yearly budget	33%	67%		
Organization values and culture	28%	72%		

        Source: Elaborated by the author

In the case of media that is property of international groups, centralization is understood as the decisions made at the matrix office and in Bogotá, participation, as those that are made by national directives with regional directives, and *empowerment*, as the decisions made in the local environment. *Graph 3* shows the distribution of answers for the question about who make decisions according to a series of decision areas that have been consulted.

The most common models tend to be participative. These are presented especially in decisions about the competitiveness strategy (78%). Other decisions that are based on the participative models are: the definitions about organizational values and culture (72%); yearly budget (67%), which, generally, is done in the areas, but approved by management or chief executive officers; the choices concerning contents and moments of the education and training programs (50%) and, in fewer amounts, the definition of spaces for advertising (44%). Decisions relative to this last subject are mostly responsibility of the managers, and the commercialization and sales areas, in the case of some regional printed media.

The issues that have the most centralization in decision making are the granting of licenses, promotions, and bonus payments (44%) and the handling of contracts, sanctions, or personnel dismissal (39%). Last, *empowerment* is mostly used, but not in a significant way, in the supplier contracting service (44%).

4.4 Temporality covered in planning

In 79% of the organizations of the sample there is a strategic direction model, since there is a formally written mission and vision. Their contents are defined by the board of directives in 78% of the cases.

88.9% of the companies have a *mission.* The elements integrated in these statements include: a) *the type of contents delivered,* in this case culture, entertainment or information; b) *how work is done,* aspect that represents the differential value of the media: lending a social service, offering a accurate, on time, impartial, and objective information product; c) the *public for whom work is done* or the ones expected to be satisfied and that are the advertisers, audiences, investors, and employees; and d) *the ultimate goal of the work*, which covers the fulfillment of the right to information, democracy, and free enterprise, the generation of profitability for investors, to hold the media production and commercialization business and, in regional television channels, to work for the development of the community, the strengthening of regional identity, and the aperture to the world.

79% of the organizations of the sample have a *vision.* In large companies the contents aim to maintain the difference in audience and advertising levels, to venture in the information packaging in other supports, this is why they include the promotion of innovation, the development of electronic media, and other non conventional, as well as the expansion towards national and international markets. In audiovisual media there is a rush to be updated in technological advancements.

Regarding the comments about the mission and vision contents it is understood that the people interviewed have a clear idea of the fact that the information contents is only one and what makes the journalism industry is, basically, to adequate it to diverse supports, depending on the economic capacity, the infrastructure, and the public to whom it is directed. While large media have in their mission statements, concepts such as consolidating a model for contents convergence or to operate as a multimedia group; small media also includes these elements in their vision statements.

4.5 Internal communication

This part of the study presents the results of the question relative to internal communication, in two sections. First there is an analysis of the aspects related to the way in which the directive manages his/her own communication and how he/she coordinates it with other people and areas. Second, there is an exam of the following dimensions of managerial communication: message contents, ascendant communication, informal and formal communication and availability and use of internal communication media.

a. Communication planning and coordination

This group of questions determines the degree of coordination between the managerial action and the ones of the other members with positions in the organizational hierarchy.

After consulting if there is a formally written internal communications plan in the company, 39% of the interviewed stated that they have it. The remaining 61% does not have it. Generally, the companies that stated that they have a plan are the largest ones, even though there are small organizations that have historically made one.

When they were asked about what they understand as a communications plan, the directives explained that it consists in adjusting the communication needs of each moment to the internal media of the organization. The conversation about the plan leads to questioning about the existence of a dependency in charge of the of the company's communications. This is how 72% of the media of the sample has this area. This data includes the regional branches of the radio networks, considering that they have organizational communicators, even though they are in Bogotá.

In media with internal communications plan, 45% of the managers give suggestions to it, and in 33% of the cases, are informed abut the contents and in charge of approving it. It is important to mention that the communications personnel depend, in national media of the human resource areas.

Graph 4. Communicators for internal publics
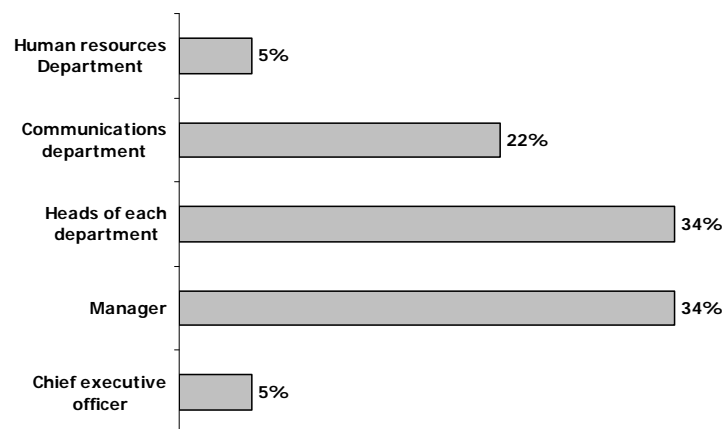
Source: Elaborated by the author

After asking who is in charge of delivering messages to the internal public, it was found that this role can be performed by several people. As it can be seen in *Graph 4,* in 34% of the sample it is done by the interviewed managers, followed by the heads of departments, 34%, and the communication

area, with 22%. As it is mentioned in redactions, the directors operate as messengers, except when concerning to administrative issues, in such case this role is assumed by the manager. When it is about information relevant to national companies, the chief executive officers or the general manager makes an official communication. The communication departments fulfill the role of messengers by through internal bulletins.

Graph 5. Meeting frequency with internal and external publics
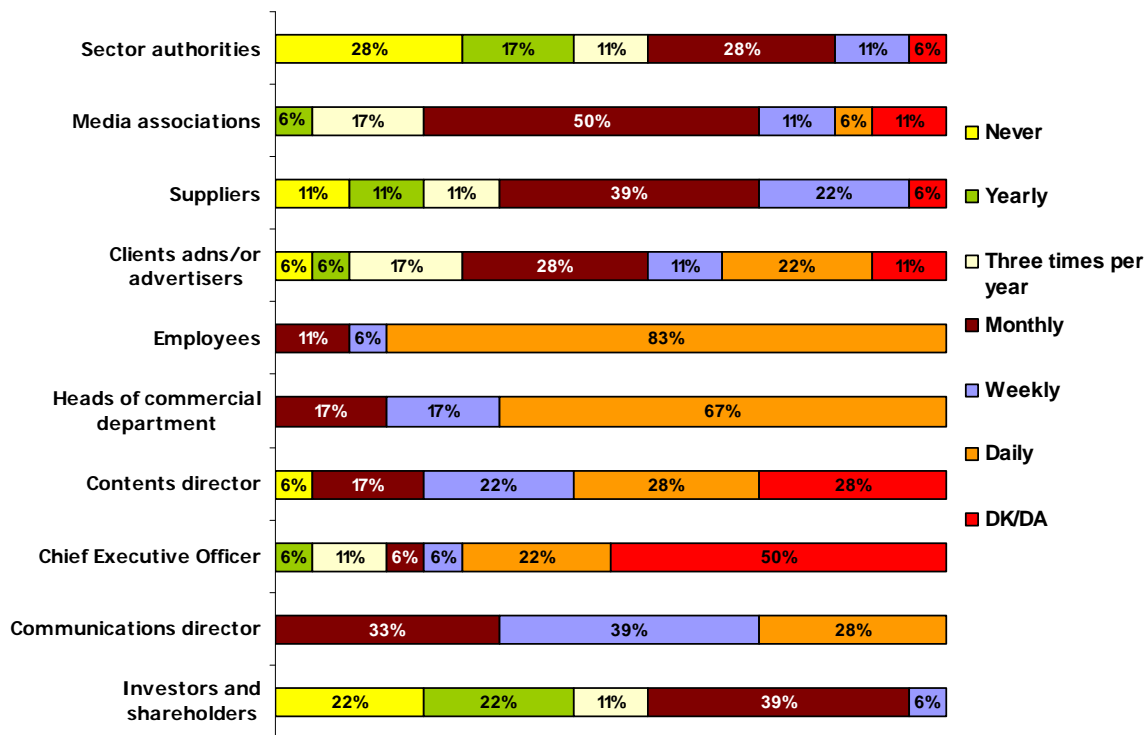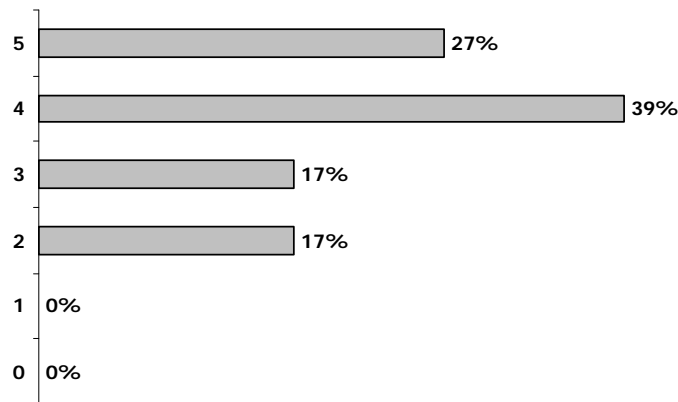

Source: Elaborated by the author

To find out aspects about the time that directives spend on communicating with internal and external publics, and also to detect the relations network that they hold, they were asked about the frequency with which they communicate with a series of people or groups that have influence in the organization. The result was that 83% of the interviewed interacts every day with the employees under his command and that 67% of the sample meets every day with the heads of the commercial area or the sales department. 39% stated that they meet once a week with personnel from the communications areas and, in general terms, the answers are scattered in what regards to other publics. The distribution of these results appears in *Graph 5*. It must be mentioned that 28% of the interviewed mentioned that they meet every day with the contents director.

After asking about the planning of the contents of the messages that mangers divulge in meetings and special events, 50% grades their performance with 5, 39% with 4, and 11% with 3. This question was made in order to determine the way in which directives take conscience of their communication acts. The same purpose operated when consulting if they worried about their non verbal communication. In this field, 45% of the sample graded themselves with 5, 28% with 4, 22% with 3, and 5.6% stated that they never thought about these topics.

b. Communication dimensions

1) Contents. After asking the managers if they divulge contents oriented to strengthen corporate values, 39% grades this aspect with a 4, 27% with 5, 17% with 3, and the remaining 17%, with 2, which states that this is not an outstanding among the interviewed, as it appears in *Graph 6*.
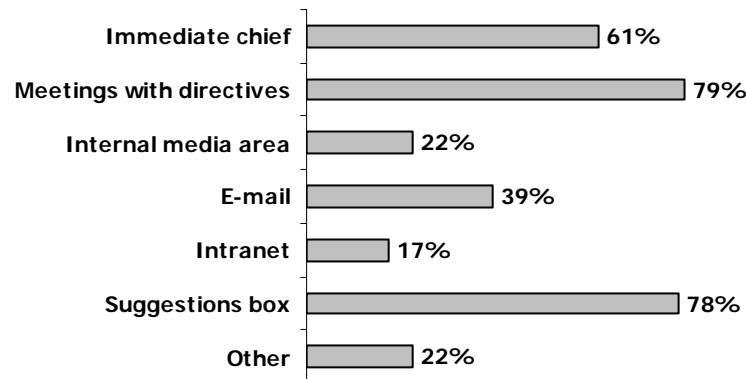
Graph 6. Manager divulges contents oriented to strengthen corporate values

Source: Elaborated by the author

This group of questions included another one about how are divulged the vision and mission contents and the values oriented to generate identification on behalf of the internal publics. It was found that these contents are mostly communicated in the inductions done to new employees, option signaled by 83% of the sample. 61% expressed that they are available when any one requires it and 56% stated that they can be consulted at any time through the Internet.

2) Ascendant communication. Directive meetings are the means used in 79% of the companies, when the employees are interested in giving their opinions and initiatives before the management, the general management or the chief executive officers. Concerning this subject there are also important mechanisms such as the suggestions box, meetings with immediate chiefs, and e-mails, answers that are explained in *Graph 7*.

Graph 7. Channels established to know personnel inquiries and suggestions

Channel	Percentage
Immediate chief	61%
Meetings with directives	79%
Internal media area	22%
E-mail	39%
Intranet	17%
Suggestions box	78%
Other	22%

Source: elaborated by the author

3) Formal and informal communication. There was a consultation about the three communication processes to detect the degree in which the directives implement informal communication: a) tours through the office, motivated by the interest in exchanging information with the employees; b) participation in extra labor activities with the personnel in charge, and c) the way in which the employees have access to the directive. It was found that 67% of the interviewed goes through the office every day and 28% once per week. Also, that the goal of the tours is to do follow up to tasks, in 45% of the cases, and that 39% of the times the topics mentioned have to do with problems of the employees.

The answers about the participation of managers in extra labor activities do not show any significant tendencies. When asked about the way in which employees have access to the directive, 67% stated that, generally, people call to the door of their office, which means that in this cases informal treatment is the most used. The remaining 33% states that employees ask for an appointment with the secretary.

The communication means that are mostly used by the managers are formal meetings. These can be daily or weekly, when there is participation of the personnel of the areas under their charge, and monthly, when the objective is to coordinate labors with other dependencies. Meetings are useful for the interviewed because in these there are decisions made and there is assignment of responsibilities, and because they enable to personalize relations.
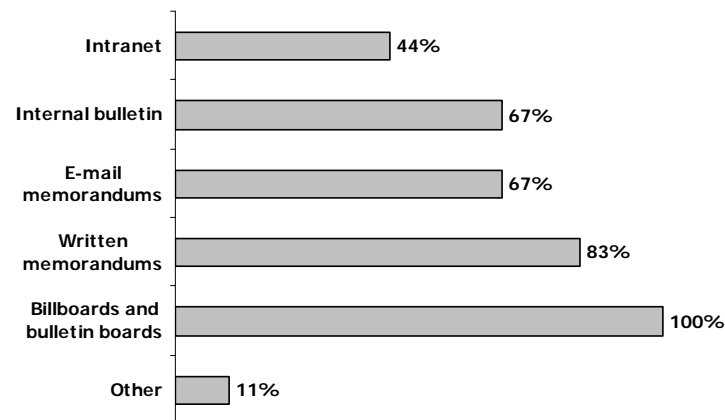
It must be mentioned that for the directives of the sample, the formality or informality of the communication is mainly determined by the type of people that participate in the exchange of messages. Informal meetings are more frequent with personnel under their charge and the formal ones are when there is the presence of superiors or directives of areas with which there is a weak relation. Last, face to face meetings are used when the contents of the communication is relevant or discussed for the first time.

4) Availability and use of the means of communication

The existence of means of internal communication between the media group of the sample is relevant, considering that 100% has billboards or bulletin boards, 83% uses written memorandums; 67% has an internal bulletin and uses memorandums through e-mails, and 44% has Intranet, distribution shown in *Graph 8.*

Written memorandums are especially used to divulge decisions taken in meetings, as a means that enables to send information downwards. Intranet and e-mails represent tools that make possible for the employees to receive information continuously.

Graph 8. Availability of internal means of communication
Positive answers

Means	Percentage
Intranet	44%
Internal bulletin	67%
E-mail memorandums	67%
Written memorandums	83%
Billboards and bulletin boards	100%
Other	11%

Source: elaborated by the author

5. Conclusions

This analysis has enabled to obtain information from those who are responsible for the administration in an important group of news media of Colombia, regarding the way in which they practice the dimensions that define the management style and internal communication.

After asking about organization values, most of the interviewed signals as the ones of the journalism profession as the most distinctive, which increases the possibility that people from areas different that redaction can identify with them and find a sense to the work they do. This result would get the directives of the sample closer to the leadership style, since the leader sets his effort in the creation of a unified identity of the company, a product of the sharing of needs and objectives. Now, the exercise of divulging these values is not strong among the interviewed, which would decrease the possibilities for these directives to base their authority on identification processes.

It was found that participative decision making rules, procedure which, even if it is associated to directive models that are oriented towards relations, results really appropriate for this sector, considering the division of powers presented in it. This model, in any case, must not argue with the autonomy of the areas to make their corresponding decisions, and in those that should strengthen decision making models that are closer to *empowerment*.

As it can be seen in the answers obtained, the type of motivations chosen do not depend solely on the style or the point of view of the directive concerning which are more pertinent, but also on the organizational conditions, since it has been found that in many cases, some incentives, especially economic ones, are subject to decisions taken in higher hierarchic instances.

Concerning the vision and mission formulations, there are evident issues concerning the size of the organization and the capacity of the media to diversify and have access to new technologies. It could not be said to not consider the long term of these statements, but that they are based on the technological and economic environments, and that there are short in what regards to new formats and

the innovation in genres and narratives. Since it touches the contents directly, this analysis must be done, detailed, in a study of the style dimensions applied to the aforementioned directives.

In general terms, the communication of the interviewed group of managers is characterized for giving priority to employees in the exchange of messages. This is how the manager function regarding this subject is to serve as a link with other areas, specifically, by coordinating actions with the contents direction. The distribution of the aforementioned questions about the level in which they plan the messages that they give in meetings and rallies and the degree in which they take conscience about their communication behavior, reveals that these directives tend to express themselves spontaneously. This way, actions such as planning, coordinating, controlling, and following of their communication, is not significant in the sample; this is why there is a need to reinforce the development of communication skills related to these series of processes.

The answers relative to the communication areas state, largely, that its existence does not have a direct relation with the size of the companies. The same way, it is inferred that the work that they do is not important in some of these media, since institutional communicators depend on the human resources area and not the directives or the chief executive officers. In many cases they do not fulfill a strategic function, since they are in charge of producing means and it is not mentioned, among their labors, to enable message exchange among the different organization dependencies, to mediate and help to make visible the interest of the areas in the organizational context, or to help the management of the communication of the directives. According to the model of analysis between style and internal communication taken for this research, the directives that recognize the importance of communication in the organizational context tend to create these areas, to be supported on these, and give them representation in the dominant coalition or managerial group, so the communicational factor is considered at the moment of making corporate decisions.

The state of ascendant communication is positive, since all media have mechanisms for the direction to know the opinions of the personnel. These result have a direct relation with the frequency of the meetings and face to face encounters, it can be said that there are spaces for bi-directional exchange. It is precise to highlight that the meeting is the most used means of communication in organizations in which there are participative models imposed for decision making, which is related to the answers obtained in the analysis on decision making.

Regarding the intensity of formal and informal communication, it must be highlighted that there is a certain level of balance in the answers, even though there is formal access to the directive when an employee needs to talk to them, there is also the case of managers that support themselves on interactions of informal nature, such as the tours through the office and the generation of a less stressful environment when the meetings are done with the personal under their charge.

Finally, internal means of communication are perceived as complementary to interpersonal communication, which states that, any way, there is a selectiveness criteria when these are used.

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