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The power of next generation Hispanics

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By Luis Clemens | [Multichannel.com](#)

The U.S. Hispanic population is in the midst of a seismic shift from one consisting primarily of Latin American immigrants to a second and third generation dominated by their U.S.-born children.

With tens of millions of dollars in advertising and subscription fees potentially at stake, advertisers and media companies are trying to glean as much as they can about this next-generation Hispanic audience's viewing habits.

Eighty-five percent of Hispanics in the U.S. under the age of 19 are second or third generation whereas 60% of those over 19 are foreign-born, according to Census Bureau data. "They are reshaping the Hispanic market," said Lucia Ballas-Traynor, general manager of MTV en Español.

The last couple of years have seen the creation of multiple cable channels and syndicated programming aimed at next-generation Latinos. One hurdle in targeting this audience is the dearth of specific ratings data broken down by generation — Nielsen Media Research does not include country of origin in its measurement of Hispanic households. In the absence of generation-specific Hispanic ratings information, a number of studies have been conducted to survey next-generation Latino attitudes and behaviors.

Market research firm Synovate estimates the current Hispanic population (not including the island of Puerto Rico; see story, page 22) at just under 45 million and their buying power at \$704 billion.

TNS Media Intelligence estimated total Hispanic advertising (including television and print but not radio) at \$1.9 billion from January to June of last year and is projecting 10.4% growth in ad expenditures during 2006 for Hispanic network television. The Cabletelevision Advertising Bureau last year estimated 7.1 million Hispanic households subscribe to cable or satellite.

Key to deciphering the Hispanic media and marketing landscape is determining just how different next-generation Latinos are from their foreign-born parents and grandparents — what programming they watch, what messaging they respond to and whether or not they are interested in Spanish-language programming.

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THE LANGUAGE BARRIER

"I can't think of any culture where, by the third generation, English is not dominant," said David Morse, president of New American Dimensions, a multicultural market research firm. Morse believes Latino culture is often kept alive even among fifth-generation Hispanics but that Spanish-language skills deteriorate rapidly among the children of immigrants.

Synovate group account director Jim Starks said the most striking findings in his firm's latest Diversity Markets report are the increase in the proportion of bilingual respondents and the decrease among those who consider themselves "Spanish-dominant."

Many market research studies such as Synovate's rely on self-language-assessment, in which respondents' answers are taken at face value — the reliability of which some have called into question.

"When a Latino tells you they are bilingual, you wonder what that means," said Ed Rincon, who runs multicultural market research firm Rincon & Associates and is an adjunct professor of Hispanic marketing at Southern Methodist University. "Bilingual in terms of reading, writing or listening skills? It is a rare person that is bilingual in all skills."

"I think what we have in the second and third generation is a lot of passive comprehension. [In other words] you understand the language but you answer back in English," said Williams College Latino Studies Professor María Elena Cepeda. "They are not Spanish-dominant, not educated in Spanish; but they still have a connection to Spanish."

Ballas-Traynor helped pioneer the use of bilingual programming in 2000 on Galavision, the Univision-owned cable network. But the approach was not a ratings success, and Galavision reverted to strictly Spanish-language programming.

According to Nielsen Media Research, Galavision is now by far the highest-rated cable channel among Hispanics with 36 of the top 40 most-watched shows during January. The network reaches over 37 million subscribers.

Nickelodeon made a "deliberate and premeditated" move when it introduced its popular bilingual animated character Dora the Explorer in 2000, according to Nick senior vice president of research and planning Marsha Williams.

"Spanish becomes through Dora this sort of magical thing. The ability to speak another language [becomes] really cool and powerful," said Nick executive creative director Brown Johnson. "There is a matrix for each season [specifying] which [Spanish] words are going to be learned and how many times they are going to be repeated."

"Thirty percent of our programming is in English and 70% is in Spanish," said Hispanic marketing manager Carlos Castañeda at La Familia, a small cable channel with under 400,000 subscribers. "We are moving to a newer Hispanic generation where we have both languages merging."

Some advertisers are also going the bilingual route. A spot for Toyota Motor Corp.'s hybrid Camry that aired during Super Bowl XL, for instance, featured a father and son conversing in a mix of Spanish and English.

"Hispanic children recognize that language is what makes them unique. They tell us that language is a key factor in the definition, the recipe of who I am even if they are not using it much," said Michelle Valdovinos, vice president of research at the Cultural Access Group, which conducts an annual multicultural kids' survey commissioned by Nickelodeon. In the firm's 2005 results, 68% of young Latinos surveyed said it was "very or kind of important to see [their] ethnic group" represented on television.

The same appears to be true even for third-generation adults who don't speak Spanish. Among third-generation Hispanics in the New American Dimensions study, 57% "intend to make sure [their] children speak Spanish." Among those same third-generation adults, only 15% said they themselves spoke Spanish well or very well. Spanish-language TV viewing among this group averaged 2.8 hours per week.

According to the same study, second-generation Hispanics are watching 5.2 hours of Spanish-language television a week.

"I think a lot of it is a tribute to the relevance of specific telenovelas [to] second and third generation Hispanics. Spanish-language television is the only place where you can see yourself on TV as a Hispanic," said New American Dimensions' Morse.

POPULARITY OF TELENOVELAS

In a New American Dimensions' survey of young Latinos, telenovelas were the overwhelmingly favorite Spanish-language programming, with sports and variety shows tied for second.

Telenovelas are attracting very young viewers, despite much of their more mature content. According to Nielsen Media Research data, Univision averaged 635,000 viewers ages 2 to 11 throughout primetime during the first two weeks of 2006 — a virtual tie with ABC, which had 636,000 viewers of the same age for the same period. The audience numbers drop by almost half for those 12 to 17, but Univision is still in third place ahead of CBS, NBC, The WB and UPN.

"We tend to have more family-type viewing," said Univision senior vice president of research Ceril Shagrin. "Children in homes where their parents are speaking mostly Spanish tend to watch Spanish-language television as a family."

It is impossible to know exactly what part of the ratings estimates actually reflect second- or third-generation viewing habits because the Nielsen figures are not broken down by place of birth. Yet, inferences can be drawn by comparing the Nielsen ratings to the generational breakdown of the Hispanic population, particularly for persons 2 to 17, a demo predominantly comprised of second- and third-generation Latinos. Nielsen classifies households on the basis of the language spoken at home — a practice that has drawn some criticism.

"Nielsen needs to get its act together [and] give us a true picture of Hispanic television viewing," said Robert G. Rose, CEO of Aim-Tell-A-Vision, syndicator of English-language programs targeting the U.S.-born Latino market. Rose is actively campaigning to make place of birth one of Nielsen's Hispanic sampling criteria.

Leo Perez, COO of the English-language and Latino-themed cable network SiTV, echoes some of Rose's criticisms. "Part of the reason we don't have Nielsen ratings today is that there is not a great deal of flexibility within the Nielsen samples," he said.

"The idea that people are going to program for this bilingual audience I think sounds good and right," said Univision co-president of sales Tom McGarrity. "But when you consider these cable outlets by [virtue of] their programming and distribution are competing with dozens or hundreds of channels, it is a difficult business."

(At press time, Univision was reportedly considering a plan to put itself up for sale.)

Morse acknowledged Univision's success: "You reach a heckuva lot of second-generation Hispanics with Univision, so then it becomes [a question of] what is the most effective way to spend my dollars." But still, he said, "I am advising my clients there is really an opportunity to connect with Hispanics through English-language programming."

Some advertisers apparently agree. Suzuki signed a sponsorship deal in 2005 with English-language SiTV, which along with competing cable channels LATV, MTV en Español and mun2 target young Hispanics. "We are the first network they have advertised on to reach the Hispanic audience," said Perez. "They understand our audience." Suzuki recently renewed the deal with SiTV for a second year.

"Univision presents themselves as 'we are all you need.' They certainly deliver a large proportion of [second-generation] viewers," said Debra Nason, managing director of Bromley Interlink. "At the same time, the second-generation have more [viewing] options than the first generation that are Spanish-dependent. By nature they are going to be more dispersed, and you are going to find them in a variety of places."

Children's programming is one of the few places on English-language television where Hispanic characters enjoy a significant presence. In addition to Dora the Explorer and

the spin-off *Go, Diego, Go!* on Nickelodeon, Latinos are prominently featured on *Mucha Lucha* on The WB as well as *Sesame Street* and *Maya and Miguel* on PBS. Not surprising if you consider Hispanics account for 19% of the U.S. population between the ages of six and 14.

"We recognized that this is where the population is heading, so [we said] let's get ahead of the curve and lead the market," said Nickelodeon's Williams. The decision has paid off with young Hispanic viewers. *Dora* and *Diego* accounted for seven of the top ten most-watched programs for Hispanics ages 2 to 5. In November 2005, *Dora* was seen by 2.4 million Latino viewers ages 2 to 11.

Williams believes media companies will provide more Latino-friendly programming as that demographic grows older: "The demand will be there, especially for those who are accustomed to growing up with *Dora*."

WRESTLING AND MUSIC

Hispanic viewers are also watching lots of wrestling. World Wrestling Entertainment's *Smackdown!* averaged more than one million Hispanic viewers each week during January — consistently placing it among Nielsen's top ten most popular English-language shows with Latinos. The NBC Universal-owned cable channel mun2, which targets young bilingual and bicultural viewers, airs WWE reruns, but the bulk of mun2's programming remains music-related.

"You can't have a youth network without music," says Telemundo senior executive vice president of network strategy Antoinette Zel, who has overall responsibility for mun2.

Mun2 last year commissioned a qualitative and quantitative study from youth research firm Look-Look, in which young Latinos were asked to keep diaries and responded to traditional surveys. While they have not yet released the survey's findings, Zel said those insights will slowly but surely feed into the programming grid. For now, the mun2 programming grid is not particularly different from some of its competition.

"I was looking at mun2 the other day and it looked like the way LATV did," said LATV president Daniel Crowe. (Flavio Morales, LATV's founding director of programming, is mun2's current vice president of programming.). Crowe argues that LATV's original programming distinguishes it from the competition. The fact remains, for now, that LATV, mun2 and MTV en Español all rely on a steady programming diet of music videos. And some videos like that of reggaeton superstar Daddy Yankee can be seen on all three channels.

Barbara Ponce, emerging markets advertising manager at Honda Motor Co., is counting on the popularity of reggaeton dance music to win over the young Latino market. Ponce reached a product integration agreement to feature the Honda Civic in the first music video by reggaeton label Wu Tang Latino. "The Civic placement demonstrates Honda's support for the youth community and provides awareness of the Civic, putting us in the right place with our influencer customers," said Ponce.

"We feel there is a big demand for [music programming] but music videos are a commodity" said SiTV's Perez of his competitors, referring to the fact that music videos are so widely available online and on cable.

With or without a heavy focus on music, Wu Tang Latino president Ray Acosta is confident the current crop of Latino-themed cable channels will succeed.

"Those channels are doing something that wasn't being done before. I see them controlling [Latino] consumers [ages] 18 to 24," Acosta said. "I believe they are going to grow and get bigger and bigger. Why? Because we [the Hispanic market] are getting bigger."



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