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A Research Primer for Spanish-Language Newspapers

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EXECUTIVE SUMMARY

Despite the accelerated growth of the U.S. Latino population and expansion of the number of Spanish-language newspapers, the proportion of advertising dollars directed to Spanish-language newspapers remains relatively small. Past efforts to accurately describe the size and composition of Spanish-language newspaper audiences have not met the expectations of the advertising community. This primer is designed to help Spanish-language newspaper stakeholders – including publishers, investors, and research staff – improve their measurement of Hispanic newspaper audiences as one avenue for increasing their share of Hispanic media expenditures.

TARGET AUDIENCE

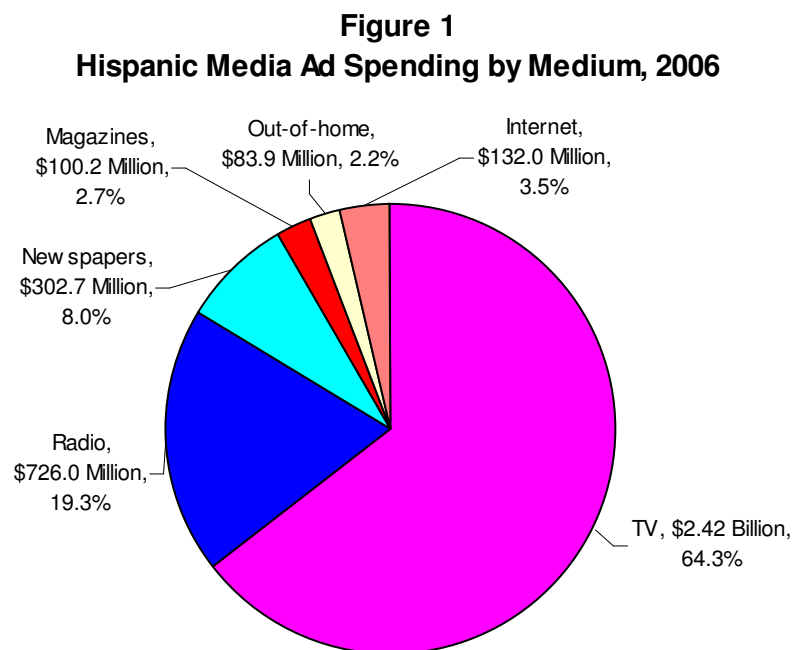
Current and potential publishers/investors/research staff of Spanish-language newspapers

Background

As the newspaper industry continues to struggle with declining circulations and erosion of public trust, stakeholders across the country, including investors and publishers of mainstream newspapers, are exploring Spanish-language newspapers as one solution to sustain their readership base. Interest in developing Spanish-language publications, or perhaps purchase existing ones, has grown as news headlines continue to focus on the explosive growth of the

U.S. Hispanic population, estimated at 43 million in 2006.¹ Indeed, the Latino Print Network estimates that there were 768 Hispanic-targeted newspapers in the U.S. – 89 percent of them in Spanish -- a substantial leap from 550 publications in 2000 and 355 publications in 1990.²

Despite their impressive growth, however, advertising dollars directed at Hispanic-targeted newspapers remain a relatively small piece of the overall expenditures. As shown by Figure 1 below, Spanish-language newspapers captured only 8.0 percent of the 2006 ad revenues spent on all Hispanic media, as compiled by Hispanic Business and TNS Media Intelligence.³



Source: Hispanic Fact Pack, Advertising Age, 2007 Edition.

Although various factors shape the process of media buying, the small proportion of ad revenues directed to Spanish-language newspapers suggests a definite disconnect with the expectations of the advertising community. Aside from the challenges confronting the general newspaper industry, advertiser confidence in Spanish-language newspapers may have eroded as a consequence of endless

industry debates about language issues and some well-publicized circulation scandals. A recent study by the Association of National Advertisers revealed, for example, that national advertisers are not happy with the quality of multicultural research and their ability to measure the results of multicultural advertising.⁴ Poor research and inflated circulation numbers not only draw the ire of advertisers, but have also led to some lawsuits and increased scrutiny by the Security Exchange Commission. Although the entire industry of Hispanic advertising and marketing stakeholders continue to press for greater expenditures on Hispanic-targeted campaigns, perhaps it is time to take a closer look at the value that well-designed research can provide to enhance advertiser interest and confidence in Spanish-language newspapers.

Skepticism Deserved?

Advertisers have several reasons to be skeptical of Spanish-language newspapers. For example, imagine the uncertainty faced by potential advertisers who must decide from among 10 Spanish-language newspapers in one market with little research that describes their respective audiences. Without key information about audience reach, frequency and characteristics, how are advertisers supposed to know if there is a good match between a newspaper's readership and their product?

To enhance their credibility in the eyes of potential advertisers, some publishers have opted for independent circulation audits of Spanish-language newspapers. While a verified circulation audit is a basic necessity for any newspaper, the audit simply documents the number of newspapers that were distributed to households in the circulation trade area and provides little or no information about who is *actually reading* the publication. While some circulation audit firms also conduct readership surveys, the depth and quality of these surveys may not meet the basic standards of research for measuring Hispanic audiences. For example, it is not unusual for readership surveys conducted by some audit firms to complete

nearly two-thirds of the telephone interviews in English for a Spanish-language newspaper – a likely result of an insufficient number of bilingual interviewers. Such a practice can significantly under-estimate the newspaper’s audience since English-dominant Hispanics are not the core audience for Spanish-language newspapers.

Aside from circulation numbers, national buying power estimates also accompany other information in the typical newspaper media kit that is shared with potential advertisers as another way to describe the economic potential for the publication. Unfortunately, national buying power estimates provide little value for selling the potential of a local newspaper. Apparently, many local newspapers are not aware that the Census Bureau provides a crude measure of buying power for Latinos in local markets, referred to as “aggregate income,” that can be easily retrieved for most geographic areas in the U.S.

When numbers fail, some Spanish-language advocates have been fond of making emotional appeals about the virtues of the Spanish-language. “Spanish is the language of the heart” and “we make love in Spanish” are two often quoted phrases that appear more like desperate attempts to persuade advertisers.

Naïve investors can be easily misled about the potential of Spanish-language newspapers. In one published news story, a staff member for *El Rumbo de Austin* stated that 75 percent of Hispanic adults in the Austin, Texas market were foreign-born – suggesting a strong potential for their newspaper.⁵ However, the actual Census Bureau proportion of foreign-born Hispanic adults – 37 percent -- should have alerted investors that Austin was a risky market for a Spanish-language newspaper. Investors for Rumbo announced that they would cease operations in the Austin market after only a brief period of operation.

Clearly, stakeholders in the Spanish-language newspaper industry need to re-evaluate conventional strategies if they expect to capture a larger share of the Hispanic advertising expenditures and remain profitable. The days of relying on circulation audits, emotional appeals, and buying power indicators have lost whatever appeal they may have had in the past and appear in need of a new direction.

A New Direction

Moving past the snake oil and hype, perhaps it is time to consider how good research can be used to make better decisions regarding Spanish-language newspapers and, hopefully, reinstate confidence among investors and advertisers. The suggested guidelines, while offering no guarantee of success, will hopefully encourage stakeholders to adopt a more systematic approach when communicating key information about newspaper audiences to the advertising community. The discussion will focus first on the measurement of market potential for a Spanish-language newspaper using *Census Bureau data* that requires minimal cost and effort to analyze. Secondly, we will talk about *industry-sponsored studies* and some of the practices that lead to inaccurate measurement of Hispanic audiences. Thirdly, we will discuss the value of a *readership survey* to profile the audience of a newspaper. Fourthly, we will evaluate the use of *syndicated research studies* as possible sources to describe Latino audiences. Fifth, we will examine the value of a *segmentation study* to understand the competitive environment in detail to identify segments of Hispanics that offer varying potential for market growth. Lastly, we will discuss some *suggested standards for conducting Hispanic-targeted audience studies* to facilitate selection of a credible research firm.

Measuring Basic Market Potential

Often, the decision to start a Spanish-language newspaper is based on a large dose of inspiration and a minimal amount of objective information. However, the failure to consider objective indicators of market potential increases the economic risk to investors and publishers, and complicates relations with advertisers when the market potential is over-stated. A quick read on population characteristics for a specific trade area or other geographies can be obtained economically by using an online service such as *DemographicsNow.com*, which offers several pre-formatted reports and maps for a monthly subscription fee of \$159 or an annual fee of \$1,295. Although the reports include information on the Hispanic population, they do not include detailed information such as the number of native and foreign-born Hispanics – indispensable for Spanish-language newspapers.

For several reasons, the Census Bureau is a better choice for analyzing market potential involving Hispanic persons. First, the data is free since your tax dollars have already paid for it. Secondly, it is accessible around the clock through its web site www.census.gov. Thirdly, the decennial census (conducted every 10 years) is the most comprehensive and objective source of information on the nation's population, and used by Congress and a multitude of government agencies to make important decisions about our quality of life in the United States – there are no other sources that can match the resources that are dedicated by the Census Bureau to describe the nation's population. In fact, the majority of third-party companies that provide population estimates for a fee use Census Bureau data as well. Lastly, commonly heard perceptions that Census Bureau data is inadequate for understanding the Latino population are misguided. Census Bureau products contain a wealth of information that help businesses understand Latinos, such as population, age, gender, nativity, household income, aggregate income, education, country of origin, etc. While the Census Bureau does not do a perfect job of enumerating the Latino

population, it publishes the extent of the under-count for major metropolitan areas and other indicators by which its accuracy can be evaluated. In addition to the decennial census, you can also obtain annual estimates of the Latino population from the Census Bureau's *American Community Survey (ACS)* for most levels of geography, including the nation, states, metropolitan areas, counties and cities. Population estimates and projections are also provided by a national network of state data centers. Using data provided by the Census Bureau, decision-makers can obtain an objective picture of market potential for a given trade area that can help avoid common problems in under-estimating or over-estimating Hispanic audiences.

Let's review some of these Census Bureau data items using Dallas County in Texas as a potential trade area.⁶ Table 1 below, for example, shows that 833,383 Hispanics resided in Dallas County in 2005, representing 36.8 percent of the total population of 2,267,080.

Table 1
Dallas County Population, 2005

<i>Market Attributes</i>	<i>Dallas County TX</i>
Total Population	2,267,080
Hispanic Population	833,393
Hispanic Density	36.8%

The size and density of the Hispanic population are often used as preliminary indicators of market potential for Spanish-language newspapers, although they can be misleading. For example, the Hispanic population number includes children less than 18 years old, which rarely read Spanish-language newspapers. Also, the Hispanic density of 36.8 percent is significantly lower than other Hispanic markets, which may lead one to overlook the market potential in Dallas

County. Thus, the inclusion of children can significantly over-state market potential, while a focus on population density could lead to a missed opportunity. Clearly, there is a need to fine-tune the market potential estimate a little further. Table 2 below presents an estimate of the number of Hispanic adults in Dallas County (530,871), which was derived by multiplying the Hispanic population count (833,393) by the proportion of Hispanic adults (63.7%).⁷

Table 2
Dallas County Hispanic Total and Adult Population

<i>Market Attributes</i>	<i>Dallas County TX</i>
Hispanic Population	833,393
Pct. Hispanic adults	63.7%
Hispanic adult population	530,871

While Hispanic adults represent a more realistic segment for Spanish-language newspapers, a sizeable number do not read these publications. Indeed, past research shows that foreign-born Hispanic adults comprise the core audience for Spanish-language newspapers, while native-born adults represent a relatively smaller proportion. Fortunately, Census Bureau data provides information on the nativity of Hispanics that allows us to adjust the estimate further.

In one final adjustment presented in Table 3 on the following page, the Census Bureau data tells us that 69.0 percent of Hispanic adults in Dallas County were foreign-born – resulting in a revised estimate of 366,301 when multiplying the Hispanic adult population (530,871) by the percent of foreign-born adults (69.0%).

Table 3
Dallas County Hispanic Adult and Foreign-Born
Adult Population

<i>Market Attributes</i>	<i>Dallas County TX</i>
Hispanic adult population	530,871
Pct. foreign-born adults	69.0%
No. foreign-born adults	366,301

Without considering any other information, the count of 366,301 Hispanic foreign-born adults represents the best estimate of market potential for a Spanish-language newspaper in Dallas County. A simpler way to display these calculations follows:

$$\text{No. of Hispanic foreign-born adults} = \text{Hispanic population} \times \text{Percent Adults} \times \text{Percent Foreign-Born Adults}$$

Known as the *chain ratio method*, one simply calculates the relevant proportions with the current population estimate to derive the relevant target population. In this particular case, the adjusted market potential is substantially lower than the initial population base of 833,383 Hispanics and should provide decision-makers a more realistic indicator for planning purposes. Of course, the adjusted count of 366,301 Hispanic foreign-born adults represents a crude measure of the market potential for a Spanish-language newspaper, but it is objectively derived, easily replicated across different geographic areas, and meaningful.

To add further complexity to the discussion, what if decision-makers are wanting to compare the feasibility of starting a Spanish-language newspaper in one of two potential Texas markets -- let's say Dallas County or Bexar County (includes San Antonio)? Table 4 on the following page presents the relevant Census Bureau data and related calculations for both counties.^{7,8}

Table 4
Comparison of Market Potential in Two Markets

<i>Market Attributes</i>	<i>Dallas County TX</i>	<i>Bexar County TX</i>
Total Population	2,267,080	1,482,298
Hispanic Population	833,393	849,826
Hispanic Density	36.8%	57.3%
Pct. Hispanic adults	63.7%	66.8%
Hispanic adult population	530,871	567,683
Pct. foreign-born adults	69.0%	20.6%
No. foreign-born adults	366,301	116,942
2000-2005 growth rate	25.8%	12.3%

Since the size of the Hispanic population is nearly identical in both counties, it does not help our decision-making task very much. Based solely on Hispanic density, however, there is little doubt that Bexar County (57.3%) looks more attractive as a potential market than Dallas County (36.8%). However, Bexar County reveals a much lower number of foreign-born adults (116,942) than Dallas County (366,301). In addition, the Hispanic population growth rate from 2000 to 2005 in Dallas County (25.8%) is twice the growth rate of Bexar County (12.3%). Based on this comparison, it appears that Dallas County offers substantially more market potential than Bexar County for a Spanish-language newspaper.

Without further information about the competitive environment, however, the decision to launch a Spanish-language newspaper would still be risky. It makes a great deal of difference if there are no competitors in the trade area, or if 10 competitors already exist, as is the case in Dallas County. A market that is

saturated with Spanish-language newspapers, common in large urban areas, presents substantial risks for new publications as audience shares become increasingly smaller and unique audiences are difficult to establish. By contrast, in markets with little or no competition from Spanish-language newspapers, the challenge becomes one of convincing investors and advertisers that the Latino population is substantial and not well served by existing newspapers. In either situation, these objectively-derived numbers can go a long way towards making a stronger case for a Spanish-language newspaper.

Although Census Bureau data may help you on part of this journey, it may not satisfy many of the concerns of potential advertisers, especially those with substantial experience in media buying. Many advertisers will remain reluctant to place ads in Spanish-language newspapers without further knowledge about the number of Hispanics who actually read the publication and the characteristics of these readers. The following section discusses several approaches for meeting the information needs of the advertising community.

Meeting Advertiser Expectations

Spanish-language newspapers could make more progress in capturing advertising dollars if they could convince potential advertisers of two key points about their audiences: that it is both *substantial* and *desirable* – that is, a readership that is sufficiently large and likely to buy the products or services offered by the advertisers. More specifically, advertisers desire answers to the following questions:

- How many Hispanics are actually reading the publication, and how often do they read it?
- What types of Hispanics are reading the publication? Low or high-income? Under-educated or educated? Mexican or other Hispanics? In other words, how well does the newspaper's readership match the consumers that the advertiser hopes to reach?

- How does the publication compare to its competitors? Is it at the top of the list or the bottom?
- How can Hispanic shopping behavior be described? Which stores are they shopping and which are they avoiding? What do Hispanics expect in their shopping environments? What major purchases are they planning?

To address such concerns, marketers have traditionally relied on four common methods that vary considerably in terms of scope, cost and relevance for evaluating Hispanic audiences: industry-sponsored studies, syndicated research, readership surveys, and segmentation studies. In the section that follows, we discuss the relative strengths and weaknesses of each of these methods for describing the readership of Spanish-language newspapers.

Industry-Sponsored Media Studies

Research studies that are sponsored by specific industries are useful in educating the general public about key industry trends that relate to the consumption of their services or products, and are sometimes used in the absence of other information to guide marketing decisions. Recent industry studies that focus on Hispanic consumption of products like pork, beef, and milk not only have an educational mission but attempt to promote higher consumption of their products as well. In regards to studies sponsored by the media industry, however, users of such studies are not always aware of the thin line that separates objective research from efforts to promote the industry's products or services. Indeed, methodological shortcuts have sometimes taken a back seat to accurate measurement of Hispanic audiences – a practice that is evident in studies conducted by recognized experts and organizations. While the industry-sponsored studies that follow do not directly address Hispanic newspaper readership, they nonetheless demonstrate how common methodological biases can distort statistical indicators of media usage.

Internet Penetration: For many years, the Pew Internet & American Life Project has measured Internet usage by the American public. In their 2001 study,⁹ Internet access for U.S. Hispanics was reported to be 50% -- substantially higher than the rate of 30 percent reported by the Census Bureau and other studies at the time. In deciding to interview only English-speaking Hispanics, the Pew researchers over-estimated the Internet penetration of U.S. Hispanics. The reason was simple: English-dominant Hispanics typically have an Internet usage rate that is twice the rate of Spanish-dominant Hispanics. News reports, however, did not address this subtle detail, and readers were unwittingly led to believe that the Internet usage for all U.S. Hispanics was much higher than it really was, leading to the creation of various Spanish-language web portals that later discovered that most on-line Hispanics were using English-language web sites. More recently, the Pew Hispanic Center released a study entitled “Latinos Online” that reported a different picture since they utilized bilingual interviewers to capture both English and Spanish-speaking respondents.¹⁰ This study reported an Internet usage rate of 78 percent for English-dominant Hispanics and 32 percent for Spanish-dominant Hispanics, which was more consistent with estimates by the Census Bureau as well as our own studies of Latinos over the past decade.

Retail Advertising: In its study “Consumer Usage of Newspaper Advertising 2006,”¹² the Newspaper Association of American (NAA) commissioned a research firm to conduct 3,008 telephone surveys of the American public.¹¹ The study was designed to evaluate the subject of preprints and other forms of newspaper retail advertising – an important component of American newspapers. Unfortunately, only English-speaking Hispanics were included in the study. The exclusion of Hispanics who prefer to conduct an interview in Spanish – about six in ten based on our past 30 years of experience – suggests that any study findings related to the Hispanic sample could be misleading since the media and consumer behavior of Spanish-dominant Hispanics varies greatly from English-dominant

Hispanics. Moreover, the proportion of Spanish-dominant Hispanics that read English-language newspapers – especially on Sundays -- approaches 30 percent in some large urban markets. Thus, the omission of Spanish-dominant Hispanics in the NAA study is not a trivial concern.

Persuasiveness of Spanish-Language Ads: A study by Roslow & Nicholls¹³ has been frequently cited by Spanish-language advocates as proof that Spanish-language television ads are more persuasive than English-language ads for U.S. Hispanic audiences. No doubt such studies are partially responsible for directing nearly 90 percent of all Hispanic-targeted media buys to Spanish-language media – even though 60 percent of U.S. Hispanics are native-born Hispanics who consume more English-language media. Careful inspection of the methodology section of this study, however, reveals efforts to *stack the deck* in favor of Spanish-language media. For example, nearly 80 percent of the study respondents were foreign-born Hispanics who were primarily Spanish-dominant. Also, English-dominant Hispanics were curiously excluded from the study without any explanation. To make matters worse, the study was published in the *Journal of Advertising Research* and thus given an additional boost of credibility. Interestingly, the results of the study were generalized to all U.S. Latinos even though most of the study respondents were foreign-born Latinos. Studies that try so hard to justify the virtues of the Spanish language appear more concerned with promoting Spanish-language media than scientific research, and consequently mislead the advertising community. A better strategy would have been to conduct the study with a sample of Hispanics that represent the correct proportions of native and foreign-born Hispanics in the U.S. and allow both English and Spanish-language speakers to evaluate the ads.

Magazine Readership: The Magazine Publishers of America (MPA) recently released their study entitled “Hispanic Magazine Readers” that was completed by telephone interviews with a national sample of 901 Hispanic magazine and non-

magazine readers, as well as 250 general market respondents for comparison purposes.¹⁴ Under the umbrella of the MPA, the study was funded by a coalition of stakeholders in the Hispanic-targeted magazine industry, including AARP's *Segunda Juventud*, *Hogar*, *Editorial Televisa*, *Latina*, *Muévelo*, *Selecciones*, *People en Español*, Meredith Hispanic Ventures, and The National Association of Hispanic Publications. Among its various findings, the study concluded that:

- An estimated 85 percent of Hispanics read magazines, similar to the general market rate of 84 percent;
- Hispanics' passion with magazines was richer and more emotional than the general market;
- Compared to other media, Hispanics were more trusting of advertising in magazines, believed that magazines provided more useful information, and that magazines were more educational.

Without considering any methodological issues, the study findings make a convincing case that Hispanic-targeted magazines have many strengths that can benefit advertisers' media plans. Nonetheless, certain points should be considered before embracing the study conclusions. First, the estimate of 85 percent of magazine readership is nearly twice the rate that we have discovered in our own studies of Hispanic adults over the past years, which have rarely exceeded 40 to 50 percent. Like the problem related to the over-estimate of Internet usage by the Pew Internet and Life Project, the MPA's study may have over-represented native-born Hispanics. The Power Point presentation of the study reviewed for this analysis did not include much methodological detail related to the composition of the Hispanic and non-Hispanic samples. Our past experience with Hispanic consumers has shown that magazine readership is significantly higher among females and native-born Latinos. Moreover, Hispanic-targeted magazines have always been limited by distributional issues; therefore, knowing the geographic distribution of the study sample would be useful. Secondly, the non-Hispanic sample size of 250 was relatively small and likely to

render any statistical comparisons meaningless. The use of indexes for the various Hispanic vs. non-Hispanic comparisons can also be misleading. For example, a Hispanic Index of 243 that was found between Hispanics (17%) and non-Hispanics (7%) on the statement regarding the reading of magazines “while traveling to or from work” was based on a sample of just 14 general market respondents – not exactly a reliable comparison. The appropriate measure should have been a statistical test of significance which would take the difference between these two measures and their sample size into account. Lastly, the most significant omission from the study was the failure to provide information about the audience size and composition for the various Hispanic-targeted magazines in the U.S. Although not necessarily a study objective, it is difficult to understand how potential advertisers are going to be persuaded to expand their investment in Hispanic-targeted magazines simply because these magazines are more engaging and passionate to Hispanic readers. Ultimately, it makes a difference if you have 1,000 engaged readers or 20,000 engaged readers – the advertising community would have benefited from this important information as well.

Users of industry-sponsored studies of Hispanic audiences should understand that such studies are often designed to promote the industry’s products or services, and are not as likely to disclose important information about their study methodology. When provided in sufficient detail, however, a careful analysis of the study’s methodology section will often help in evaluating the objectivity and soundness of the study’s conclusions.

Syndicated Research

Syndicated research services provided by companies like Scarborough Research and Simmons Market Research Bureau provide a wealth of information about Hispanic consumers throughout the U.S., including information on readership of newspapers. For a specified fee, subscribers are able to obtain annual information about consumers in the markets covered by the syndicated service.

In the case of Scarborough Research, their *Ciudad Hispana de Scarborough* product appears to be the most comprehensive syndicated product available on U.S. Hispanic consumers, including 35,000 Hispanic adults in 32 DMAs who are interviewed via a combination of telephone interviews and diaries (see www.scarborough.com for more detail). The product includes information related to media usage, demographics, retail behavior, product and service usage, and lifestyle information. Moreover, subscribers have access to the *Local Market Hispanic Custom Studies* product which over-samples Hispanic respondents in nine of the top local U.S. markets with the highest density of Hispanic consumers.

The Simmons Market Research Bureau also provides a Hispanic product called *National Hispanic Consumer Survey* that includes a sample of 7,500 Hispanic adults in eight of the largest Hispanic markets. The web site (www.smr.com) describes a very comprehensive database that includes media habits, product and service preferences, attitudes and opinions. Relatively little information, however, was provided by the web site related to the methodology used in compiling their Hispanic product.

The broad scope of these syndicated studies makes them ideal for businesses, especially those with a national focus, to obtain competitive information on Hispanic media and consumer behavior. So, why would anyone need to conduct their own custom study of Hispanic consumers?

Despite their impressive array of products on Hispanic consumers, syndicated research is limited in important ways. For example, the *size of the Hispanic sample* in each market may not be adequate for addressing key questions. From statistical formulas, we know that a sample size of 384 provides a margin of error of plus or minus 5 percent at a confidence interval of 95 percent. When the

sample size drops to 200, however, the margin of error increases to 7 percent and decreases the power to detect statistically significant differences -- *even if they exist*. Subscribers may indeed enjoy the power of the Scarborough reporting system since it provides the opportunity to make detailed comparisons with a multitude of variables; however, the small sample sizes resulting from “slicing and dicing” the data into different groups can quickly render these comparisons statistically meaningless.

To overcome some of the issues related to small sample sizes, Scarborough Research offers subscribers a Hispanic over-sample in nine of the markets that they serve, although no information is provided about the composition of the sample in terms of nativity (i.e., native vs. foreign-born). Scarborough Research is certainly not alone in not disclosing the nativity of their Hispanic samples. Other syndicated services that also appear indifferent to this important Hispanic attribute include Simmons, Arbitron, and Nielsen. The absence of information about the proportion of native and foreign-born Hispanics in their samples can lead to sample imbalances and inaccurate estimates. For example, if the Census Bureau’s proportion of foreign-born Hispanic adults in a market is 50 percent but 80 percent of the syndicated study respondents are foreign-born adults, readership estimates for a Spanish-language newspaper will be over-estimated if left unadjusted. Conversely, readership estimates for a Spanish-language newspaper could be under-estimated if the proportion of foreign-born adults in the study is 50 percent but the Census Bureau tells us it should be 80 percent – a common occurrence when a survey research firm with mostly English-language interviewers attempts a study of Hispanics. Scarborough Research utilizes several weights for sample balancing, but does not include nativity as one of these weights.

In addition, Scarborough Research does not provide all Hispanic respondents a Spanish-language questionnaire -- only Hispanics residing in local markets that

are designated as DST (Differential Survey Treatment) receive it. A local market qualifies as a DST market if it has a Hispanic or African-American concentration of at least 7.5 percent, or have 250,000 or more Hispanic or African-American consumers. DST market respondents also receive special incentives to enhance response rates in the study. Spanish-language newspapers that are proposed for smaller communities would clearly not benefit from the Scarborough products.

The issue of trade-area definition also presents a barrier to the use of syndicated research, which utilizes pre-defined DMAs throughout the U.S. to conduct their research. Newspapers often have their own designated circulation area in mind to reach the desired Hispanic readers that may not fit the area utilized by the syndicated service. An over-sample of Hispanics would clearly not help in this situation either.

Another thorny problem is the tendency for some syndicated research studies to classify Hispanic respondents into “language buckets” that past research has shown are very unreliable.¹⁵ Based on national telephone surveys sponsored by The Nielsen Company, the language buckets are used as “universe language estimates” against which other syndicated firms compare or adjust their language data on Hispanics – such as Arbitron. The language buckets are created from responses to questions about the language that Hispanics use most often at home, such as Spanish all the time, Spanish most of the time, Spanish and English equally, English most of the time, and English all of the time. Our own past research clearly shows that home language usage varies considerably within any one Hispanic household – it depends on the subject matter under discussion, the age of the individuals engaged, their country of origin, the task at hand, and general familiarity with the language. In a typical Hispanic household, Spanish may be used when talking among family members but takes different paths when viewing television, completing homework assignments, listening to radio, playing games, talking to friends, and other activities. Despite their lack of

reliability, companies like Nielsen go to great lengths to classify Hispanic households and persons into these language buckets as if there is one language category that adequately describes the linguistic dynamics of a Hispanic household – sort of like trying to come up with one blood type for all household members – in either case, the outcome is fairly meaningless. The use of these language buckets misleads newspaper decision-makers because the dominant language spoken at home often differs from the dominant language used for reading or other tasks. In the Dallas metro area, the majority of foreign-born Latino adults speak Spanish at home, but 25 percent still read English-language newspapers. Children often use Spanish when talking at home with family members, but primarily rely on English when reading books or magazines.

Marketers often use these language buckets to select a segment of Hispanics that they believe will be more responsive to their advertising campaigns, such as Spanish-dominant Hispanics. However, choosing potential customers based on a language strategy without first evaluating whether the product meets the needs of a specific segment of consumers is putting the cart before the horse, and overlooks other important segments of Hispanics that may find the product very appealing. In the case of home improvement supplies, for example, it is reasonable to believe that most Hispanic homeowners purchase these items, regardless of their language skills. Rather than focus on a specific language category, it makes more sense to identify the segment of Hispanic homeowners with a higher propensity to buy home improvement supplies, and then design a marketing mix that reaches this segment effectively – which could include a combination of English and Spanish-language media. The home improvement company could clearly lose sales if the advertising agency dictates a linguistic strategy in buying media without first understanding the home improvement needs of Hispanic consumers.

In summary, syndicated research can be a valuable tool for measuring Hispanic market potential and the competitive environment, especially for campaigns with a national focus. But its limitations suggest that some newspapers may be better served by a customized local study that provides more control over the trade-area definition, sample size and composition, the definition of meaningful segments of Hispanics, and specific areas of inquiry. Ironically, syndicated research may not provide its subscribers the competitive edge that they truly need for one simple reason: everyone has access to the same data.

Readership Survey

A readership survey provides a cost-effective method of profiling a newspaper's audience with more control than is possible with syndicated research. The primary goal of a readership survey is to describe the characteristics of the publication's audience in areas that the publisher and potential advertisers will consider useful, including demographic and socioeconomic characteristics, news interests, lifestyles, reach and frequency, brand preferences and general buying behavior. Less attention is generally devoted to evaluating the competitive environment since such studies are more costly and require larger samples to get a good reading on the competition.

The methods used to conduct a readership survey have generally included telephone surveys, paper surveys inserted inside newspapers that are distributed in racks, and surveys mailed directly to households. In general, telephone surveys offer more control over the sampling and interviewing process, and depend less on the reading ability of the respondents than paper questionnaires. However, the increasing number of residents living in cell-phone only households has caused some marketers to question the use of the telephone methodology for obtaining representative samples of Hispanic consumers. A recently released study by The Center for Disease Control, based on household interviews of the U.S. population, revealed that 11.8 percent of U.S. households are cell-phone

only, while 15.3 percent of Hispanic households fell into this category.¹⁶ Persons residing in cell-phone only households were more likely to be unrelated roommates, renters, less than 30 years old, men, and in poverty. The bias introduced by excluding cell-phone only households, however, is not always clear since some studies have shown that it makes little difference on total survey results when efforts are made to include cell-phone only households, while others have shown that the results vary. Excluding cell-phone households does not mean that all persons fitting this demographic profile will be excluded from the sampling frame – only that their presence may be under-represented unless efforts are made to correct the survey findings for this lack of representation. In yet another study,¹⁷ the telephone methodology was compared to other survey methods (mail, pre-recruited Internet panel, pre-recruited mail panel, and in-newspaper survey) to determine which method was superior in producing an unadjusted sample of respondents that more closely matched key Census Bureau demographics. The sample of respondents resulting from the telephone survey yielded the closest overall match to the population.

Readership surveys are also conducted by inserting a questionnaire inside newspapers (using nth sampling) inside racks or mailed to the households in a designated trade area. Both of these methods offer less control over the sampling process and little control over who actually completes the survey. Difficult to read written responses, low response rates, and missing data often compromise the integrity of the data. It is not uncommon for such surveys to end up with a study sample that is comprised of 80 percent or more female respondents, or produce inflated readership estimates based on pass-along rates. Moreover, the lack of information about the sample universe that is represented by the study respondents complicates the process of estimating precise numbers of readers in a defined trade area and using weights to adjust for sample imbalances.

All things considered, the quality of the information provided by a well-designed telephone survey greatly exceeds the quality of the information provided by the other methods discussed here. Consequently, a telephone-based readership survey would be a better investment of a newspaper's research budget, and more likely to provide potential advertisers credible information for making their media buys.

Market Segmentation Study

Aside from meeting the information needs of the advertising community, some newspaper publishers have a need to evaluate their publication in more depth, especially in regards to content and format, their competition, detailed shopping behavior, and opportunities for growth. In cases where a mainstream newspaper is considering the purchase of an established Spanish-language newspaper, these areas become even more pertinent to decision-makers.

In general, a segmentation study of Hispanics can identify meaningful segments of consumers that may or may not fit the planned marketing strategy for the newspaper, assuming one had been articulated. To assure congruency with the marketing strategy, planners must consider a myriad of decisions that are likely to shape the newspaper's long-term survival. For example, issues related to content and design have important implications for the type of Hispanic that is likely to read the publication, such as:

- Language Format: Spanish-only vs. bilingual
- Balance of news interests: Local, national and international, Hispanic vs. non-Hispanic related
- Lifestyle: Music, entertainment, hobbies, cooking, sports
- Social: Healthcare, education, immigration, youth programs, language programs, citizenship
- Preferred pickup method: Home delivery, rack, Internet, retailers, workplace

Evaluating the competitive environment is also a central and complicated issue, especially in markets with numerous Spanish-language publications. Hispanic newspaper readers often read several newspapers – including mainstream English-language newspapers and Spanish-language newspapers. The significant *cross-reading behavior* makes it challenging to develop a unique profile of readers for a Spanish-language newspaper and convey to potential advertisers that the publication provides a unique value to readers that is not provided by its competitors. One solution to this dilemma is to include questions that ask respondents to rate the available newspapers along specific quality dimensions, such as: *Which newspaper is doing the best job of reporting news and information about the Hispanic community? Which is the leading Spanish-language newspaper in your community? Which newspaper will be your primary newspaper over the next 12 months?* Attention can also be directed towards comparing the top Spanish-language newspapers along a number of key quality dimensions, such as concern for the local Hispanic community, relevance to everyday living, best local news coverage, and others deemed important. Such measures of brand equity can be very valuable in helping potential advertisers reach a decision in a highly competitive market.

A segmentation study also allows a more detailed analysis of the shopping behavior of Hispanics residing in the trade area. For example, questions often address shopping destinations for groceries, prescription and non-prescription medicine, health and beauty aides, clothing, furniture, appliances, electronic items, automobiles, cellular phones, travel, insurance products, home improvement, and other categories. Respondents may be queried about factors considered when choosing a shopping destination, interest in coupons, intentions to purchase selected products or services, and the best sources of shopping information. In sales presentations to potential advertisers, publishers can use this market share information to encourage further investment in advertising to selected segments of Hispanic consumers.

Perhaps more importantly, a segmentation study allows a careful analysis of the different segments of Hispanics that reside in a trade area so that decision-makers can choose the segment or segments that best fit their marketing strategy. In some large urban markets, the proportion of Hispanic adults that read any Spanish-language newspaper varies from 15 percent to 40 percent. Moreover, it is not uncommon to find that 30 to 40 percent of foreign-born Hispanic adults do not read any Spanish or English-language newspaper – a finding that may point to significant growth opportunities if the needs of these individuals are carefully evaluated.

In analyzing the results of a segmentation study, the analyst should avoid the common practice of analyzing cross-tabs to death. Many variables related to Hispanic audiences are highly inter-correlated and provide redundant information – such as nativity, household income, language behavior, education, and others. Consequently, one can easily be buried in a mountain of statistically significant comparisons that provide piecemeal marketing insights but lose the overall picture. Instead, a discriminant or cluster analysis is likely to provide more useful insights about the size and characteristics of definable Hispanic segments. These multivariate procedures also take the inter-correlations of the study variables into account and provide a clearer picture of their unique influence.

For example, a useful application of the *discriminant analysis* procedure is to classify Hispanic respondents into two mutually exclusive categories -- readers and non-readers of the newspaper – and allow the procedure to identify which of the study variables do the best job of differentiating these two groups. By contrasting readers and non-readers, potential advertisers can more readily understand the uniqueness of the publication's audience.

Sometimes, however, significant cross-reading behavior among Spanish-language newspapers precludes the identification of a sufficient number of unique readers for a specific Spanish-language newspaper. In such a situation, it makes more sense to classify respondents into groups based on their general readership patterns and explore the differences among these groups. Following is another suggested classification:

- Reads only English-language newspapers
- Reads only Spanish-language newspapers
- Reads both English and Spanish-language newspapers
- Does not read any English or Spanish-language newspapers

A univariate profile of the groups with relevant study variables will identify interesting characteristics between the groups, while a discriminant analysis will identify the study variables that do the best job of differentiating the four groups. Although the size of each group will vary depending on the market analyzed, one can use this information to identify the *primary audience* to be targeted (i.e., Hispanics who only read Spanish-language newspapers) and a *secondary audience* (Hispanics who read both English and Spanish-language newspapers). Hispanics who read only English-language newspapers would likely be considered a segment of little interest to a Spanish-language publisher, while Hispanics who do not read any English or Spanish-language newspapers might represent a sizeable segment to target for future growth opportunities. What proportion of these non-readers are so illiterate that they would not read a newspaper, regardless of the efforts made? The answer to the question is not clear, especially since these non-readers tend to show a similar demographic profile to Hispanics who read only Spanish-language newspapers. It would be a smart move, however, to evaluate the needs of these individuals more carefully through further research before drawing a conclusion about the potential influence of illiteracy. There could be problems, for example, related to uneven

distribution in selected zip codes, a mismatch in news interests related to country of origin, the presence of objectional newspaper ads, a negative community reputation, or perhaps other factors that could be remedied.

Cluster analysis, by contrast, does not require the analyst to define mutually-exclusive groups for the analysis – it actually creates them for you based on the patterns of similarities and differences on a variety of consumer attributes like interests, lifestyles, attitudes, and behaviors. With origins in the life sciences, cluster analysis was used by scientists to determine botanical classifications for unknown plant life by analyzing various attributes of the plants under consideration. Plants with similar attributes but uniquely different from other plants were classified into one category, while other plants were classified into their appropriate categories based on their unique similarities and differences. Cluster analysis has been used in many studies of consumers as well, and perhaps an example relating to newspapers would be helpful.

Let's assume that a publisher was not sure if the news interests among Hispanics in a trade area were homogenous or varied considerably. It is well known that Cubans generally have higher incomes and education attainment than Mexicans and Puerto Ricans, and that they differ in other behaviors as well. These demographic or socioeconomic differences, however, do not mean that they have divergent interests, values or attitudes – indeed, they could be more similar psychologically speaking than the demographics suggest. This would be important to know in regards to a newspaper's editorial content since a community with divergent news interests would be more challenging to satisfy than a community whose news interests were more homogenous. A cluster analysis could be conducted with a series of questions that measure news interests to determine if Hispanics in the study primarily shared the same news interests or whether there are segments of Hispanics with unique sets of news interests. A sizeable segment of Hispanics, let's say 40 percent, may share a

strong interest in international sports. A close look at the demographic profile of this segment may reveal that the segment is composed primarily of males who are 20 to 30 years old, foreign-born, renters, Colombians and Mexicans, and rarely read a Spanish-language newspaper. Clearly, the editorial department should focus on starting or expanding its emphasis on international sports as one way to attract more readers from this segment. Since they are primarily renters, a rack distribution would also make more sense in reaching these potential readers.

A segmentation study can define various segments, but not all of them will be useful or relevant to decision-makers. To be useful, a defined segment should meet the following criteria:

- **Measurable**: Can the size & purchasing power of the segments be measured? The segmentation study provides precise information about the size of each segment, its socioeconomic attributes and spending behavior in order to assess its purchasing power.
- **Accessible**: Can segments be reached and served? The segmentation study provides information on the segment's media behavior and desired distribution points to ensure that Hispanic consumers are reached by the publication.
- **Substantial**: Are segments large or profitable enough? It makes a big difference to a publisher if the segment represents 5,000 or 50,000 potential readers. A segmentation study provides these estimates to help publishers evaluate their expected profitability.
- **Actionable**: Can effective programs be designed for attracting & serving the segment? Publishers should dedicate the required resources to attract the desired segment through relevant editorial, advertising and promotions.

In summary, a well-designed segmentation study can provide information that is critical for decisions related to the long-term viability of a Spanish-language newspaper. Due to their added scope and complexity, however, segmentation studies are more costly than other types of studies, and generally require a

minimum of 1,000 respondents in local markets for reliable results. A segmentation study with a broader geographic scope or one that requires increased precision may easily require upwards of 2,000 respondents. Nonetheless, the cost of a segmentation study may be minimal in comparison to the costs associated with operating or buying a newspaper that fails in the early stages of development.

Selecting a Research Firm

Finally, since it is likely that a newspaper or investor will contract a research firm to conduct a study of Hispanic audiences, it may be worthwhile to consider the following recommended standards for evaluating potential vendors. Do not let the size and perceived credibility of the firm distract your attention away from these standards since large and established research firms are just as likely as other firms to overlook them.

Sampling Issues: The manner in which Hispanic respondents are selected and screened for the study should be described in sufficient detail to ensure that it is random, provides adequate geographic coverage, includes a sample size that is large enough to address the study objectives, and does not over or under-sample native or foreign-born respondents. Although a sampling statistician is best prepared to consult on complicated sample designs, in many cases the use of a common statistical formula for calculating the desired sample size at a known margin of error is sufficient. The exclusive use of Spanish-surnames to select respondents can omit about 15 to 20 percent of Hispanics without Spanish-surnames or unlisted households; therefore, random digit dialed (RDD) numbers are also needed to ensure inclusion of these households. Race/ethnic terms used to screen Hispanic respondents should not rely solely on the terms “Hispanic” or “Latino” since these terms may exclude respondents who find these terms unacceptable. A preferred method for identifying Hispanic respondents is to use the Hispanic or Latino labels in a race/ethnic question and supplement the

label with a short list of countries of origin. In addition, the practice of selecting only Spanish-dominant Hispanics in newspaper studies can under-estimate readership estimates since about 15 to 20 percent of English-dominant Hispanics also read Spanish-language newspapers.

Instrument Design: The questionnaire must be provided in English and Spanish, and pilot tested on a sample of the target population to check the relevance of question wording, concepts, and scales. Back-translations are not adequate for identifying regional variations in translated words or phrases, or the level of difficulty that is appropriate for the target audience. Even today, there are research firms that do not provide interviewers a Spanish-language version of a questionnaire in studies involving Hispanic audiences, expecting instead for the interviewers to translate the English version “on the spot” as the need requires. Both the English and Spanish-language questionnaires should be *thoroughly* reviewed by study sponsors prior to the initiation of data collection activities.

Data Collection: Only experienced bilingual interviewers (that is, balanced bilinguals) should be employed to ensure that both English and Spanish-speaking Hispanic respondents have an opportunity to be included in the study. Using only Spanish-language interviewers who call back Hispanic respondents identified by English-language interviewers leads to the systematic under-representation of foreign-born respondents. In most U.S. markets that we have studied, about two-thirds of randomly selected Hispanic adults will prefer a Spanish-language interview, so one should be skeptical of research firms that show very different outcomes with a general sample of Hispanic adults. The exception to this are markets like San Antonio where the proportion of native-born Hispanics is higher than the foreign-born. Although many large firms use predictive dialing systems to call large numbers of households over a few days, spreading the data collection over a longer period of time is more beneficial in

terms of obtaining a more representative sample. By all means, *plan to monitor the interviewing* at randomly selected periods to ensure that the firm meets your expectations. Increasingly, research firms are outsourcing their data collection to firms located outside of the U.S. in order to benefit from more competitive pricing – a practice that should be disclosed to clients before a study is initiated. However, foreign-based firms are more likely to employ interviewers that are more Spanish-dominant and unfamiliar with the marketing environment in the U.S. Mispronunciations of common U.S. brand names and differences in interviewer dialects can result in lower response rates and invalid responses from U.S. Hispanic respondents – problems that can significantly increase the costs of data collection and compromise the integrity of the data. Important lessons can be learned from the experiences of the retail banking industry as they have outsourced many jobs to call centers in foreign countries. In a recent news article that reviewed a study on off-shoring of financial services jobs by Deloitte & Touche LLP,¹⁸ the study investigators summarized an important finding:

“They’re discovering that using foreign call centers, even those very efficient at the task, led to an erosion of the overall relationship with banking consumers....they’re less likely to purchase credit cards, loans and the like than if they’re dealing with a call center more local to them.”

Apparently, local culture matters greatly in the call center retail industry and likely plays a prominent role in the research industry as well.

Data Analysis: Even the best designed and executed studies will occasionally end up with sample imbalances, especially in regards to gender and nativity. Part of the reason for these imbalances is that Hispanic females are usually more cooperative than Hispanic males, and foreign-born Hispanics are more cooperative than native-born Hispanics. These imbalances can also arise from

interviewers with a habit of completing more interviews with members of their own gender, and “bilingual” interviewers who are not really balanced bilinguals and prefer to conduct interviews with respondents in the interviewer’s dominant language. Lax supervisors are also partially to blame when daily monitoring of interviewers is not a priority. Unless corrected with post-stratification weights, these sample imbalances can distort statistical indicators that vary with gender and nativity. The recommended source for the correct proportions of Hispanic gender and nativity is the Census Bureau, which provides this information for most geographic areas in the U.S. Post-stratification weighting, however, is not a remedy for a badly designed and executed study of Hispanics and should be used cautiously by experienced analysts. Importantly, analysts should avoid the use of unreliable weights, such as the language weights used by Nielsen and Arbitron, to adjust their raw data.

Reporting: To properly understand the findings of a research study of Hispanics, the written report should include an executive summary, the background and study objectives, a detailed methodology, the study findings, conclusions and recommendations, references, and supportive materials in the appendix, such as the survey questionnaires, tabulations and statistical analyses. Importantly, the methodology section should include an explanation of how the respondents were selected, the gender and nativity of the respondents, and the proportion of respondents that were interviewed in English or Spanish. If weights were used to adjust the raw data, a presentation of the un-weighted and weighted data should also be provided so that the reader will understand the extent to which the raw data needed adjustment. Significant biases in Hispanic studies are often buried because a research firm was not required to provide a detailed methodology, or the study sponsor’s interest did not go beyond the executive summary. As a general rule, it’s best to read the methodology section first before embracing the study findings. Lastly, a careful analyst will limit the generalization of the study findings only to the Hispanic respondents included in

the study's sampling frame. For example, if only Spanish-dominant Hispanics were selected for the study, generalization of the study results to the total Hispanic population would not be appropriate.

Nurturing Growth into the Future

An important factor in the continuing viability of Spanish-language newspapers is the responsibility assumed by English-language media in stimulating advertiser interest in Hispanic consumers. It is safe to assume that most of the advertisers that have an interest in targeting Hispanic consumers are probably using English-language media. However, these potential advertisers are not likely to learn much about the consumer behavior or economic potential of Hispanic consumers from English-language sources. Why? Because most of the content that is presented about Hispanics by English-language media sources tend to focus on topics like illegal immigration, drug trafficking, under-achievement, and dependence on public agencies – topics that present a picture of Hispanics as undesirable consumers. The occasional articles that discuss the consumer behavior of Hispanics have generally focused on national trends that are less relevant to local advertisers. Clearly, advertiser interest in Hispanic consumers could be enhanced by simply including more stories on the consumer behavior of local Hispanics in English-language media. Increased coverage of local Hispanic-owned businesses and events would also complement the proposed strategy. Thus, as advertisers become more familiar and interested in local Hispanic consumers and business owners, they are more likely to spend advertising dollars in both Spanish and English-language media to target the Hispanic segment that they desire.

Concluding Thoughts

In today's competitive marketplace, the challenges faced by Spanish-language newspapers are truly daunting, but not necessarily overwhelming. The guidelines included in this paper will hopefully encourage stakeholders in the Spanish-language newspaper industry to focus more attention on accurately describing the size and composition of their audiences as well as important consumer behavior desired by advertisers. Hopefully, the reader will incorporate some of the standards of research discussed in this paper as they evaluate the merits of research conducted on Hispanic audiences.

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Dr. Edward T. Rincón, president of Dallas-based Rincón & Associates, is a research psychologist who has conducted studies of multicultural consumers over the past 30 years for private and public clients throughout the U.S, Puerto Rico and Mexico. He has evaluated Hispanic media audiences in studies conducted for ABC and CBS television networks; The Daily Herald, The Atlanta-Journal Constitution, The Palm Beach Post, The Ft. Worth Star-Telegram, and others. Dr. Rincón has taught university courses on Hispanic marketing, survey research methods, and focus group techniques. In the spring of 2008, he will teach a new course on “Research with Hispanic Populations” at Southern Methodist University in Dallas, Texas.

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