



Language Please!

Answering the Language Question.

New York, NY – Now that the U.S. Hispanic segment numbers 40 million, many a corporate boardroom has taken notice, triggering phone calls to marketing and segmentation departments to figure out how to best leverage this opportunity.

While we've come far from the days when I was asked by a senior executive, "When does a Hispanic stop being a Hispanic?" the question of which language to use to reach this segment has always been a topic of much discussion. Some marketers argue that Spanish is the only way to reach this segment, while others feel that English is the most effective way to go. Each of these lines of thinking has merit, but also considerable flaws.

The process truly begins with good marketing. By treating the segment with the same degree of care you would give to any new important market segment and investing the time and money needed to understand category usage, consumer needs and purchase drivers. This is a critical point, because to assume that links between a consumer and product will be the same across cultures is to walk away from the power of personal relevance. Multicultural marketing experts experience that power again and again. Talking with consumers and drawing out their cultural perspectives, often exposes reactions, positive and negative, that never occur to an outsider. That is the key imperative for marketers who want to tap the revenue potential of the Hispanic market.

With that as a basis, what are some of the key things you should know about language spoken and media usage in the Hispanic market? What is the fact-based research that provides insights into their language use? And how effective are commercials in English vs. Spanish? One key thing to note is that almost half of U.S. Hispanics are foreign-born. This is significant, as this group of Hispanics is even more likely to be Spanish-speaking and slower to acculturate than U.S. born Hispanics. In fact, 47% of the growth in the U.S. Hispanic population is driven by immigration, guaranteeing that there will always be an influx of new Spanish-speaking immigrants, requiring different communications strategies.

In a study conducted among 4,000 U.S. Hispanics, Cheskin Research found that 70% of Hispanics preferred to be interviewed in Spanish. When asked what their language preference was for communicating: 58% stated Spanish, 27% said English and 14% had no preference. Interestingly enough, Hispanic Males 21-34 showed the highest preference for Spanish, and for Hispanic Females, the age group was 28-34. It's safe to assume that one of the key drivers behind the relatively young age skew for Spanish preference is the foreign-born segment.

Beyond place of birth, age and language classification, there are several other factors to be considered as you work to gain a better understanding of your target and how to best reach them. These factors include: length of residence, marital status, self-identification and life stage. The Yankelovich/Cheskin Hispanic Monitor has derived four distinct life stage segments based on these factors: Young Progressives, Home Builders, Hearth-Hearted and Prime of Life. But within each of these segments, there are also three acculturation segments: Hispanic Dominant, Bicultural Hispanics and Assimilated Hispanics. The Home Builder segment, which ranges in age from 16-40 and Hearth Hearted segments, are more likely to be Hispanic Dominant. While a larger proportion of Young Progressives (aged 16-30) are classified as Assimilated Hispanics compared to the other segments. Surprisingly, even half of Young Progressives are Hispanic Dominant. It's doing this type of segmentation, but in a manner that's specific to your category, that provides insights into your target(s) and how to best communicate with them.

The Pew Hispanic Center cites a trend that demands to be watched and further researched: the rise in the number of second generation Latinos. In short, by the year 2020, it's estimated that second generation Latinos (born in U.S.) will outnumber first generation Latinos (born outside U.S.). The second generation segment, however, skews overwhelmingly young, with a median age of 13 that's estimated to increase to 17 by 2020. Their cultural identity will most likely be an amalgamation of their parents' experiences, and influences from their environment in the U.S. While an equal number of first and second generation Latinos use Latino/Hispanic to self-identify,

Season-To-Date Program Ranker – Tot. Hisp. A18-49

RANK	PROGRAMS	NETWORK	TOTAL HISPANIC ADULTS 18-49	
				RTGS
1	NINA AMADA MIA TUE	UNI		14.1
2	NINA AMADA MIA MON	UNI		13.5
3	NINA AMADA MIA WED	UNI		13.3
4	NINA AMADA MIA THU	UNI		12.8
5	NINA AMADA MIA FRI	UNI		11.4
6	VELO DE NOVIA TUE	UNI		10.7
7	VELO DE NOVIA MON	UNI		10.5
8	MARIANA DE LA NOCHE TUE	UNI		10.4
9	MARIANA DE LA NOCHE WED	UNI		10.3
10	VELO DE NOVIA WED	UNI		10.3
11	VELO DE NOVIA THU	UNI		10.1
12	MARIANA DE LA NOCHE THU	UNI		10.0
13	MANANTIAL TUE	UNI		9.6
14	MARIANA DE LA NOCHE MON	UNI		9.6
15	MANANTIAL THU	UNI		9.5
16	BAJO LA MISMA PIEL TUE	UNI		9.2
17	VELO DE NOVIA FRI	UNI		9.2
18	MANANTIAL WED	UNI		9.1
19	BAJO LA MISMA PIEL MON	UNI		9.0
20	MANANTIAL MON	UNI		9.0
54	AMERICAN IDOL-TUESDAY	FOX		5.0

Source: NHTI (All Dayparts, Regular Programming, All Broadcast Nets, 9/22/03-3/28/04)

Top English Language Programs-NTI vs NHTI-Adults 18-49

RANK	PROGRAMS	NETWORK	ADULTS 18-49		
			NTI	NHTI	INDEX
1	AMERICAN IDOL-TUESDAY	FOX	11.6	5.0	43
2	AMERICAN IDOL-WEDNESDAY	FOX	10.8	4.8	44
3	APPRENTICE	NBC	9.5	3.7	39
4	CSI	CBS	9.3	2.8	30
5	FRIENDS	NBC	9.3	4.2	45
6	E.R.	NBC	8.7	3.4	39
7	SURVIVOR: ALL-STAR	CBS	8.6	2.8	33
8	BIG FAT OBNOXIOUS FIANCE	FOX	7.9	4.3	54
9	FOX NFL SUNDAY-NATIONAL	FOX	7.8	3.8	49
10	SURVIVOR: PEARL ISLANDS	CBS	7.7	2.3	30
11	CBS NFL NATIONAL	CBS	7.6	3.3	43
12	WILL & GRACE	NBC	7.5	3.4	45
13	FOX NFL SUNDAY-SINGLE	FOX	6.7	3.7	55
14	NFL MONDAY NIGHT FOOTBALL	ABC	6.6	3.1	47
15	AVERAGE JOE	NBC	6.4	2.9	45
16	BACHELOR, THE	ABC	6.4	1.6	25
17	COUPLING	NBC	6.3	2.4	38
18	CSI: MIAMI	CBS	6.2	2.2	35
19	NFL MONDAY OVERTIME	ABC	6.2	4.2	68
20	FEAR FACTOR	NBC	6.0	3.7	62

Source: NTI, NHTI (all Dayparts, Regular Programming, All Broadcast Nets, 9/22/03-3/28/04)

it will be interesting to follow how this population segment growth trend, and their preferences, will influence Hispanic communications strategies in the future.

So what kind of programming are Hispanics watching today, and in what language? The Nielsen Media Research Company conducts an annual enumeration study to determine language spoken by Hispanic households. The ratings data that Nielsen provides is available for the Total Hispanic Market (irregardless of language preference) and Spanish-dominant Hispanics. If you were to review a recent national ranker of the TV programs watched by Total Hispanic A18-49, a group that includes English and Spanish speaking Hispanics, you would find that the top 53 programs are in Spanish (**Figure 1**). The first English-language program, American Idol, comes in at number 54.

The next logical question is: what kind of English-language programs do Hispanics watch? In comparing ratings delivery for the top English-language programs against the Total A18-49 population vs. delivery against the Total Hispanic A18-49 population, we found that Reality and Sports programming have a particular appeal to this segment. These programs, while popular, still significantly under-deliver Hispanic A18-49 (**Figure 2**).

It's important to note that according to Nielsen (Jan '04), the incidence of Spanish-dominant Hispanics varies geographically, from highs of 67% in Miami and 52% in Chicago to lows of 20% in Albuquerque and 16% in Corpus Christi. If your target includes Hispanics across language strata's, then English-language media or programming that delivers Hispanic households, especially in markets like Albuquerque or Corpus Christi, would be needed. An important part of this mix should also be programming that has an inherent Hispanic appeal: from Dora The Explorer and The Brothers Garcia, to the George Lopez Show. If your target demo is a 12-34 Hispanic with an urban mindset, mun2 on cable and Urban Latino on broadcast, among others, offer up relevant programming. This year alone will see the launch of two new cable networks targeting English and bilingual Hispanics: Si TV, which launched in February, and coming this summer, Voy. In some cases, simply dropping a general market commercial in these programming environments would be inappropriate and ineffective. The messaging needs to be relevant to the target. On the Spanish-language front, in addition to Univision and Telemundo, there are more than 30 cable networks that serve Spanish-speaking Hispanics.

While reach is critical, understanding the effectiveness of commercials in Spanish and English when targeting Hispanics is key. Clearly, many Hispanics watch Spanish and English-language TV. But how effectively are they being reached in these languages? A research study conducted by Roslow Research in 1994 and then again in 2000, sought to answer this question. This study exposed groups of Spanish-dominant and bilingual Hispanics to English and Spanish ads in a cluttered program environment – which is precisely how a viewer would be exposed to a commercial message. The findings:

- The commercials in Spanish were:
 - 57% more effective in message communication than English
 - Significantly stronger against bilinguals, with 36% more able to correctly playback message vs. English commercials
 - 4½ times more persuasive than ads received in English.

Clearly, marketing to Hispanics in Spanish and English is the smart thing to do. But knowing your target is the critical first step toward truly understanding whom you are marketing to, and the basis for developing a communications strategy that will effectively deliver that audience.

Note: William Ortiz is president of HispanicWorks, a division of GlobalWorks Group. HispanicWorks is a New York based advertising firm that specializes in marketing to the Hispanic segment.