

Contents

List of illustrations	xi
Foreword: <i>Félix F. Gutiérrez</i>	xv
Preface: <i>Alan B. Albarran</i>	xvii

PART I: SPANISH LANGUAGE MEDIA: A COUNTRY-BY-COUNTRY EXAMINATION	1
1. Spanish Language Media in the United States KENTON T. WILKINSON	3
2. The Media in Spain: Three Decades of Transformation ÁNGEL ARRESE, JUAN PABLO ARTERO and MÓNICA HERRERO	17
3. The Media Industry in Mexico MARÍA ELENA GUTIÉRREZ RENTERÍA	34
4. The Media in Central America: Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama CATHERINE SALZMAN and RYAN SALZMAN	47
5. The Media in Colombia GERMÁN ARANGO FORERO, LILIANA GUTIÉRREZ COBA, ALFONSO FORERO GUTIÉRREZ, JAIRÓ VALDERRAMA VALDERRAMA, RODOLFO PRADA PENAGOS, LUZ CARMEN BARRERA AVELLANEDA and ADRIANA GUZMÁN DE REYES	63
6. The Mass Media in Venezuela: History, Politics and Freedom GUILLERMO GIBENS	77
7. The Mass Media in Bolivia GONZALO SORUCO and JULIET PINTO	88

8. The Media in Ecuador	103
RODRIGO JORDÁN TOBAR and ALLEN PANCHANA MACAY	
9. The Media in Peru	125
ROSA ZETA DE POZO	
10. The Chilean Media Landscape	139
CRISTÓBAL BENAVIDES, MARIA IGNACIA ERRÁZURIZ, DAVID KIMBER, ISABEL SANTA MARÍA and ALDO VAN WEEZEL	
11. Media and Entertainment in Argentina: <i>Doing Business in a Fragmented Society</i>	151
LUCIANA SILVESTRI and ROBERTO S. VASSOLO	
12. The Media in Uruguay	171
EILEEN HUDSON, FERNANDO SALAS, LUCILA CARBAJAL and FLORENCIA TRAIBEL	
13. The Media in Paraguay: A Locked Nation in Times of Change	183
LIGIA GARCÍA BÉJAR	
14. The Media in Cuba, the Dominican Republic and Puerto Rico	189
JUAN PABLO ARTERO	
PART II: TOPICS AND ISSUES IN SPANISH LANGUAGE MEDIA	201
15. Growth and Trends in Spanish Language Television in the United States	203
AMY JO COFFEY	
16. Television News: Spain, Mexico, Colombia and the United States	218
PHYLLIS SLOCUM	
17. Univision and Telemundo: Spanish Language Television Leaders in the United States	237
GUILLERMO GIBENS	
18. The Latinos and Media Project	245
FEDERICO SUBERVI	
19. Advertising in Spanish Language Media	249
CRISTINA ETAYO and ÁNGELA PRECIADO HOYOS	
20. Hispanic Advertising, Marketing and New Media	266
LAUREN BOYLE	

21. The Potential of Book Publishing in Iberian American and African Countries: The Portuguese Perspective PAULO FAUSTINO	277
22. Assessing the State of Spanish Language Media: A Summary and Future Directions ALAN B. ALBARRAN	294
Contributors	300
Index	305

List of illustrations

Figures

5.1	Media Consumption in Colombia, 1999–2007	67
9.1	Presence of Peruvian Media on the Internet, 2006	135
11.1	Socioeconomic Pyramids in Developed Markets and Emerging Markets: An Illustration of Vertical Fragmentation	156
11.2	Socioeconomic Segments in Argentina as Considered in Our Study	158
11.3	Emerging Framework: Dimensions Generating Structural Differences among Groups of Consumers	162
11.4	Middle-Market Consumers: Relationship Building with Technology According to Lifecycle Stage	164
11.5	Middle-Market Consumers: Relationship Building with Content and Preferred Platforms According to Lifecycle Stage	165
11.6	Middle-Market Consumers vis-à-vis High-Income and Low-Income Consumers: Relationship Building with Technology According to Lifecycle Stage	167
15.1	US Hispanic Population versus Number of Hispanic Networks, 1986–2004	204
15.2	US Hispanic Population versus Number of Local Hispanic Television Stations, 1995–2004	205
15.3	US Hispanic Population versus Total Hispanic Television Advertising Revenue, 1997–2004	210
15.4	US Hispanic Population versus Total Hispanic Spot TV Advertising Revenue, 1997–2004	211
15.5	US Hispanic Population versus Total Hispanic Network TV Advertising Revenue, 1997–2004	211
15.6	Hispanic versus General Market Total Broadcast Television Advertising Revenue, 1997–2004	212
15.7	Hispanic Spot versus General Market Spot TV Advertising Revenue, 1997–2004	212
15.8	Hispanic versus General Market Broadcast Network TV Advertising Revenue, 1997–2004	213
19.1	Advertising Intensity in Relation to Time and GDP in Each Country	253

Tables

1.1	Top Ten Spanish Language Newspapers by Gross Ad Revenue, 2007	6
1.2	Top Ten Hispanic/Latino-Oriented Magazines by Gross Ad Revenue, 2007	6
2.1	Main Newspapers in Spain, 2008	25
2.2	Main Spanish Consumer Magazines, 2008	26
2.3	Evolution of Audience Shares of Spanish Television Channels, 2000–2007	27
2.4	Total Turnover of the Spanish Television Industry, 2005–2007 (€ millions)	29
2.5	Pay Television in Spain: Subscribers and Revenues, 2005–2007	29
2.6	Radio Stations in Spain, 2008	30
2.7	Total Revenues of the Spanish Radio Industry, 2005–2007 (€ millions)	31
2.8	Audience and Traffic of the Main Spanish Media Websites, 2008	32
3.1	Integration of Socioeconomic Levels in Mexico, 2007	36
3.2	Market Segmentation by Value, 2007	37
3.3	Principal Channels on Open Television in Mexico, 2008	39
3.4	The Twenty Papers with the Highest Published Tariffs, 2004	41
3.5	Principal Dailies with Certified Circulation above 18,000, 2004	42
3.6	Leading Main Communication Firms in Mexico, 2008	44
4.1	Demographics, 2008	50
4.2	Index Scores, Ranks and Evaluations	51
4.3	Freedom of the Press, 1980–2005	55
4.4	User Data, 2005	59
7.1	Principal Newspapers of Bolivia, 2008	98
7.2	Main Television Networks in Bolivia, 2008	99
8.1	Sales of the Top Nine Media Groups in Ecuador, 2007 (millions of US\$)	111
8.2	Open (Free) Television Channels in Ecuador, 2008	114
8.5	Radio Groups with the Most Frequencies, 2008	117
8.6	Number of Printed Copies, 2007	119
8.7	Internet Access in Ecuador, 2008	120
8.8	Ranking of the Twenty Most Visited Websites, 2008	121
9.1	Household Media Equipment, 2005–2007 (in % of Households)	126
9.2	Media Consumption (Lima only), 2007	126
9.3	Media Advertising in Peru, 2007	126
9.4	Top Five Dailies According to Circulation, 2007	128
9.5	Top Radio Stations and Audience (Metropolitan Lima Only), 2008	132
9.6	Television Audience Program Habits: I Watch . . . (%), 2008	133
9.7	Growth of Press on the Internet and Cybermedia, 1997–2004	136
10.1	Readership and Circulation of Newspapers, January–June 2007	142
10.2	Market Share of Magazines, 2007	142
10.3	Main Radio Networks in Chile, 2008	143
10.4	Internet Access Statistics in Chile, 2000–2007	145
10.5	Top Fifteen Chilean Websites Ranked by Unique Visitors, January 2008	145
10.6	Advertising Expenditure in Chile, 1995–2006 (US\$ millions) (constant 2007 prices)	145
10.7	Advertising Expenditure by Medium, 1995–2007	146
11.1	A Socioeconomic Portrait of Argentina, 2008	152
11.2	Focus Group Participants: Middle-Market Consumers (Profiles and Demographic Data)	159

11.3	Focus Group Interview Guidelines	160
11.4	Participants of Personalized, Semi-Structured Interviews: High-Income and Low-Income Consumers (Profiles and Demographic Data)	161
13.1	Total Number of Users and Percentage of Media Products, 2005	184
14.1	Main Newspapers in Cuba, 2008	191
14.2	Main Magazines in Cuba, 2008	191
14.3	Main Radio Stations in Cuba, 2008	192
14.4	Main Television Channels in Cuba, 2008	192
14.5	Main Newspapers in Dominican Republic, 2008	194
14.6	Main Radio Stations in Dominican Republic, 2008	194
14.7	Main Television Channels in Dominican Republic, 2008	195
14.8	Main News Websites in Dominican Republic, 2008	195
14.9	Main Newspapers in Puerto Rico, 2008	197
14.10	Main Radio Stations in Puerto Rico, 2008	197
14.11	Main Television Channels in Puerto Rico, 2008	198
15.1	Hispanic Networks and Launch Dates, 1961–2008	205
19.1	Percentage of GDP Allotted to Advertising per Country, 1995–2004	250
19.2	Correlation between Advertising Intensity and Time, 2008	251
19.3	Correlation between Growth in Advertising Investment and GDP, 2008	252
19.4	Participation of Each Media in the Total Investment, 2008	254
19.5	Evolution of Advertising Commitment to Newspapers, 1995–2004	255
19.6	Correlation between Newspaper Advertising and Time, 2008	255
19.7	Evolution of Advertising Commitment to Magazines, 1995–2004	256
19.8	Correlation between Magazine Advertising and Time, 2008	256
19.9	Evolution of Television Advertising Commitment, 1995–2004	257
19.10	Correlation between Advertising Commitment to Magazines and Time, 2008	257
19.11	Evolution of Commitment to Radio Advertising, 1995–2004	258
19.12	Correlation between Radio Advertising and Time, 2008	258
19.13	Advertising Agencies with Presence in Spanish-Speaking Countries, 2008	260
19.14	Media Agencies in Spanish-Speaking Countries, 2008	261
21.1	Objectives of the Iberian American Cultural Charter, 2006	282
21.2	Opportunities and Threats within the Iberian American Area	282
21.3	Revenues of Spanish Companies in Portugal, 2007–2008 (€ 000)	284
21.4	Global Media and Entertainment Markets by Region, 2007–2012 (\$US millions)	284
21.5	Book Publishing Market Trends, 2003–2012 (US\$ millions)	287
21.7	Consumer and Educational Book Publishing Market, 2003–2012* (\$US millions)	288
22.1	Highest and Lowest Birth Rates among Spanish Language Nations, 2007	295
22.2	Best Places to Do Business (country followed by 2009 ranking)	297