

Trends in U.S. Spanish Language Television, 1986-2005:

Networks, Advertising, and Growth

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Method

- Secondary data analysis
 - Bivariate correlations
 - Graphical depiction
- Sources:
 - U.S. Census Bureau
 - TNS Media Intelligence

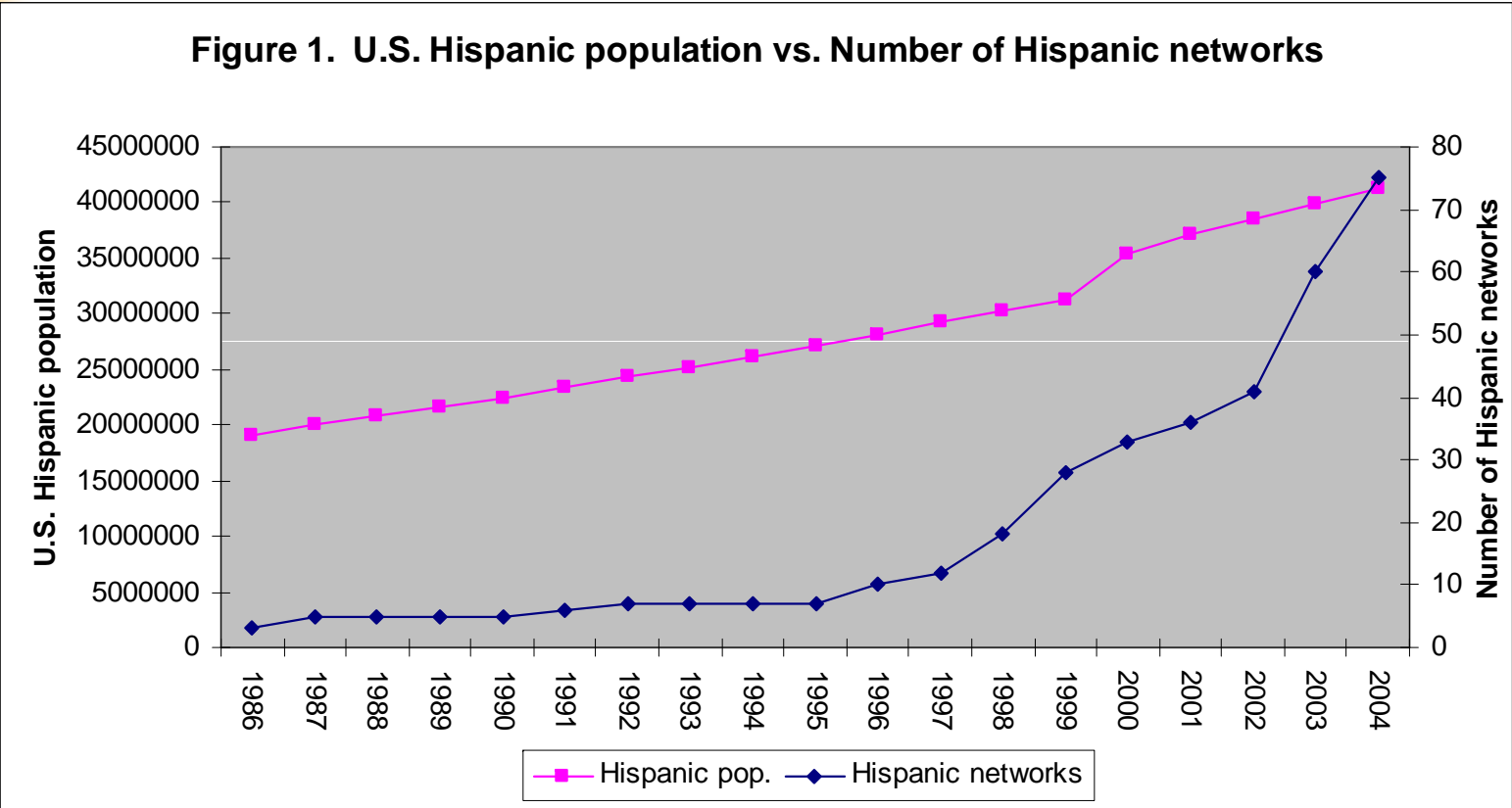


Research Question 1:

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



Figure 1. U.S. Hispanic population vs. Number of Hispanic networks



■ Sources: Multichannel News, DirecTV, Echostar, U.S. Census Bureau



Research Question 2:

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

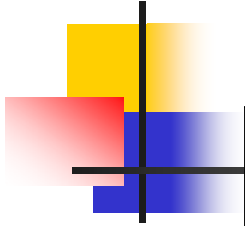
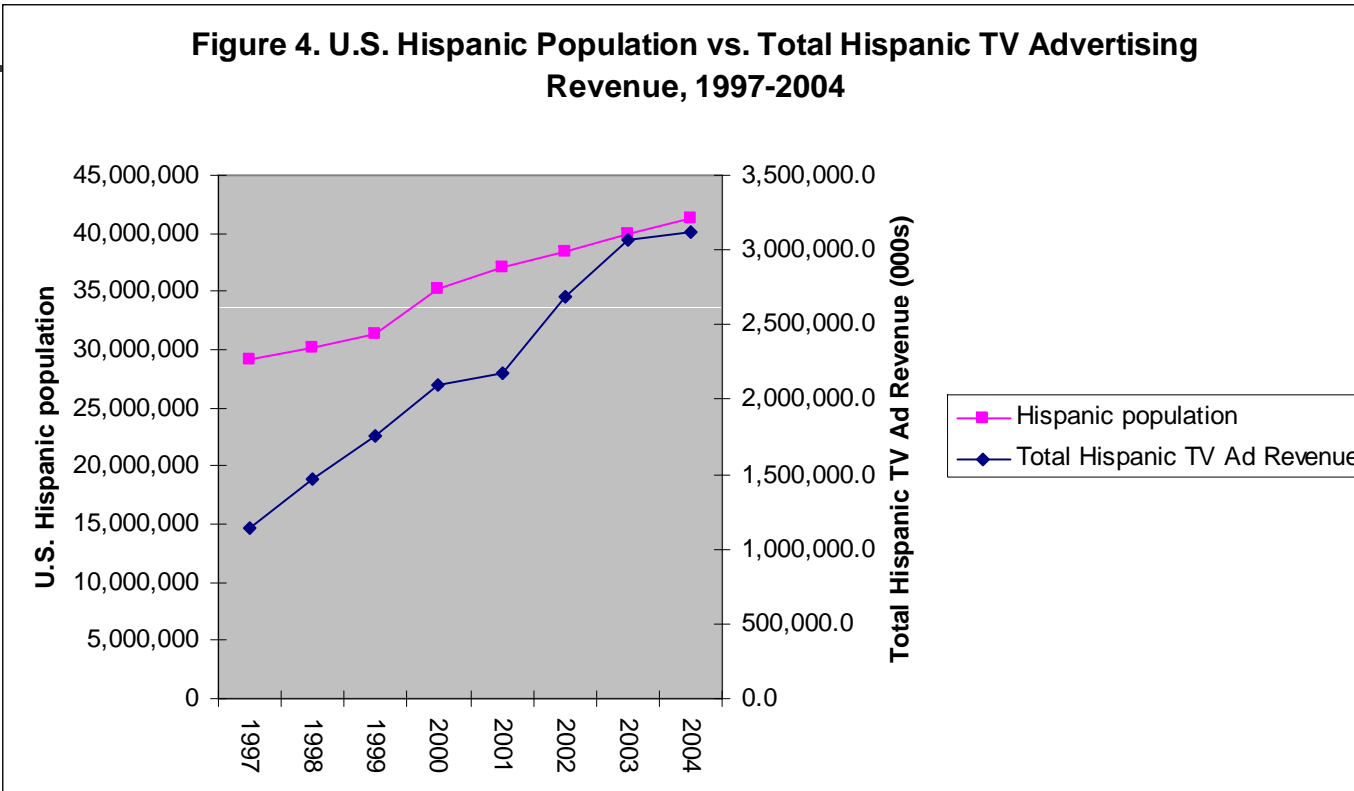


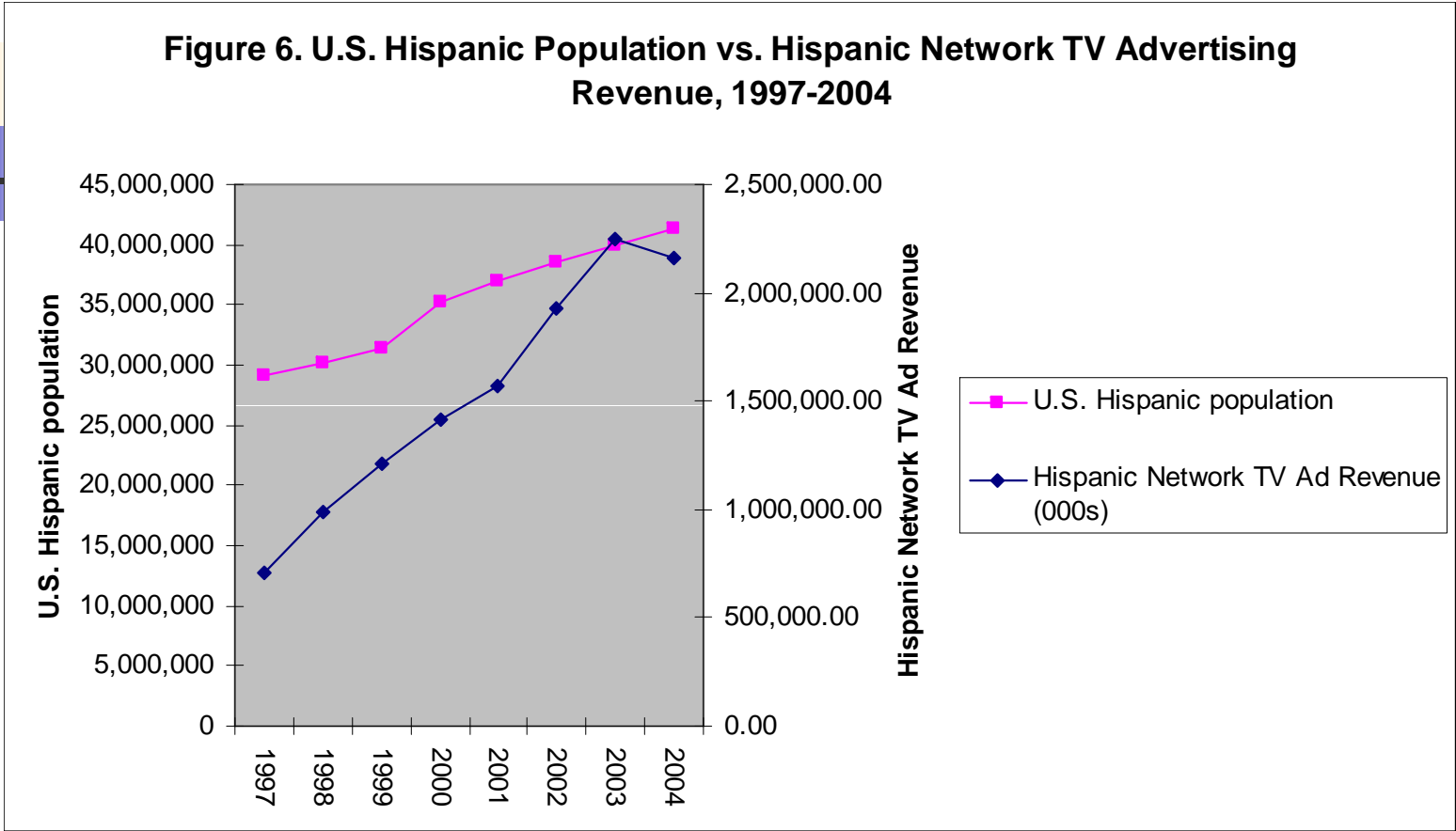
Figure 4. U.S. Hispanic Population vs. Total Hispanic TV Advertising Revenue, 1997-2004



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



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



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



Research Question 3:

- How do the number of Spanish speakers compare to the number of Spanish-language networks available, and how has this changed over time?

Table 10
Linguistic Isolation Comparisons by Language, 1980-2000

Language	Number Linguistically Isolated		Percent change in Linguistic Isolation 1980-2000
	1980	2000	
Spanish	5,581,321	13,751,256	146.4
Chinese	377,749	1,166,454	208.8
French	643,280	415,038	-35.5
German	616,740	303,616	-50.8
Vietnamese	146,947	667,033	353.9
Italian	621,763	307,150	-50.6
Korean	176,123	532,897	202.6
Russian	176,123	401,351	311.2
Polish	283,407	279,720	-1.3
Arabic	95,222	211,185	121.8
Portuguese	185,897	244,187	31.4
Japanese	175,080	236,290	35
Greek	137,676	102,585	-25.5
Persian	54,512	114,044	109.2
Armenian	47,862	94,154	96.8

Sources: U.S. Census Bureau (Table 256, 1980 Census; Shin & Bruno, 2003).



Research Question 4:

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



Household Income vs. Television Ad Spend, 1997-2004

- Hispanic network advertising revenue growth outpaced that of median Hispanic household income.
- Ad revenue growth continued for 2000-2003, despite slight declines in household revenue nationally.

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