

# From Latin Americans to Latinos: Spanish-language television in the United States and its audiences

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Este artigo irá delinear a diversidade existente entre os povos de origem e língua espanhola nos Estados Unidos e examinar como, apesar dos vários esforços dos mesmos em forjar identidades culturais próprias, as instituições governamentais, a mídia e o marketing atribuíram a esses vários povos uma identidade cultural comum dentro de sua cultura dominante. Por outro lado, em relação à indústria televisiva em língua espanhola em particular, o artigo oferece um estudo de caso sobre como as instituições estão tendo que se adaptar às pressões que enfrentam numa era de crescente diversidade cultural dentro dos EUA e do movimento de povos através de suas fronteiras.

This paper will outline the diversity amongst the peoples of Spanish-speaking origin in the US, and examine how, even in spite of their various efforts to forge cultural identities on their own terms, the institutions of government, media and marketing have ascribed to these various peoples a common cultural identity for them to assume within the mainstream. On the other hand, by reference to the Spanish-language television industry in particular, the paper also offers a case study in how institutions are having to adapt to the pressures they face in an era of increased cultural diversity within the nation-state and movement of peoples across its borders.

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While it is a truism that cultural identity is socially constructed rather than any given essence, it still has to be constructed out of something. In the case of the various peoples who constitute the so-called 'Hispanics' of the United States, that 'something' is that they all originate from Spanish-speaking countries. Even if we reject the category 'Hispanic' as an artefact of governmentality and marketing, and accept instead the term with which many of these people now prefer to identify themselves generically, 'Latino', and/or 'Latina', it is still their putative Spanish-speaking, or 'Latin' (that is, Latin American) origin which unites them. This paper will outline the diversity amongst the peoples of Spanish-speaking origin in the US, and examine how, even in spite of their various efforts to forge cultural identities on their own terms, the institutions of government, media and marketing have ascribed to these various peoples a common cultural identity for them to assume within the mainstream. On the other hand, by reference to the Spanish-language television industry in particular, the paper also offers a case study in how institutions are having to adapt to the pressures they face in an era of increased cultural diversity within the nation-state and movement of peoples across its borders.

## Diversity and diaspora

Leaving aside the fact that the speaking of Spanish in the Americas is the legacy of the first phase of

European colonialism (some would say, the beginning of globalization), the entry point in accounting for the diversity of peoples of Spanish-speaking origin in the US today is provided by the Chicano activist and film director Luis Valdez (1972) when he says, 'We did not, in fact, come to the United States at all. The United States came to us' (Valdez, 1972, xxxiii). This serves as a sharp reminder that the US incorporated thousands of Spanish-speaking people when it took over what are now its Southwestern states from Mexico after 1848, so that some Mexican-Americans in those areas can trace back their family histories there for over a hundred years, while others arrived just this morning.

Thus, length of residence in the US is one major dimension of diversity. Yet it is not just a matter of when, but the historically specific circumstances under which a certain people arrive which makes a difference. For example, the very fact that the Cubans, like the first Dominicans also, were political refugees from a crisis nation of the Cold War era has always put them in a quite different light to the Puerto Ricans, who are born as Spanish-speaking American citizens, since Puerto Rico is a possession of the US (Sullivan, 2000, p. 6). Even within a given group of common origin, there is differentiation (apart from the usual race, class and gender). For example, the Cubans distinguish between the 'golden exiles', the business and professional people who fled to Miami at the very beginning of the Cuban Revolution, and all subsequent waves of refugees (Soruco, 1996, p. 5-10).

The Puerto Ricans and the Cubans are the second and third largest groups of Hispanics identifiable by national origin, by far the largest being the Mexicans. According to the 2000 Census, Hispanics of Mexican origin amounted to 58.5% of the 35.3 million Hispanics then in the US. Those of Puerto Rican origin were 9.6% and Cuban 3.5%. However, there were also significant totals in the aggregated categories of Central American, 4.8%, South American, 3.8%, and All Other Hispanic, 17.3%. For the Central American and South American categories, the largest groups were Salvadorians and Guatemalans, and Colombians, Ecuadorians and Peruvians respectively (US Census Bureau, 2001a). While the terms Hispanic and Latino (the latter was used for the first time in the 2000 Census), are intended as non-pejorative and non-racial, people who might identify with those categories when they are offered for statistical purposes are more likely to think of themselves personally in terms of their national origin (Sullivan, 2000, p. 2-8).

Thus, in addition to time in the US and the circumstances of arrival, Hispanic groups are differentiated by the cultural and linguistic differences which are tied to their regional and/or national origins, just as surely as English-speakers recognize differences within and between the US, UK, Canada, Australia and New Zealand. Yet the presence of such large numbers of people with a common language from diverse origins in the same country has no

parallel in the English-speaking world. Rather, the US Spanish-speaking population resembles the huge diasporic overseas populations of Chinese, Indians, and Arabs, who, like the Hispanics, have been cultivated as international markets for television in their own languages and cultures (Sinclair *et al.*, 1996; Cunningham and Sinclair, 2001).

That is, to the extent that a diaspora can be redefined to include a series of mass deterritorializations from various countries (occurring both at different historical stages and continuing into the present), rather than just a (single or continuous) dispersal of people from the same country, then the landless Mexicans, the Cuban exiles, the Salvadorian and Guatemalan refugees, and the endless waves of Latin American 'economic migrants', whether documented or not, who are all now resident in the US, can be considered collectively to form a diaspora.

Our interest here is in how such a diaspora can be shaped into a television audience. If we set aside the development of Spanish-language print and radio in the US and concentrate on the television era, decade by decade, it is possible to trace the emergence of an audience for Spanish-language television in the same process as collective identities were being formed by other forces, including their own self-realization. Nevertheless, there has remained a tension between the collective identities which various groups have chosen and asserted for themselves, and those which have been chosen for them by media and marketing interests.

## The 1960s – Chicanos, SICC and SIN

Spanish-language television in the US began as early as 1955, but it was not until 1961 that there were the beginnings of a network. In that year, the Spanish International Communication Corporation (SICC) launched its first station in San Antonio, followed by stations in other strategic locations over the next ten years, namely Los Angeles, New York and Miami. Programming was supplied by the Spanish International Network (SIN) from Mexico, the principal in these companies having been the founding father of the Azcárraga dynasty subsequently associated with Televisa in Mexico, although their manager was René Anselmo, a US Hispanic. The crude but durable economic model was that entertainment programming generated for a commercial audience in Mexico and already paid for and proven there, could do double service by attracting a culturally and linguistically similar audience in the US. This has since become a fundamental strategy for Latin American producer/distributors in the US, but it did not meet with immediate success (Sinclair, 1999, p. 97-99). The prime reason for this was that an audience was still in the process of formation, and further, that major advertisers had yet to be convinced of the existence of that audience.

It is interesting to note that US Hispanics became conscious of themselves as a group and began to

mobilize politically during much the same period that television first sought to cultivate them as an audience. This is not to suggest that there was a causal relationship in either direction, but just to observe the 'elective affinity', to borrow a term from Max Weber. In particular, amongst Mexican-Americans in the Southwest in the 1960s, mobilization occurred around the Chicano movement. The choice of that name is instructive in itself, incidentally, especially in relation to the term 'Hispanic'. According to one cultural activist, 'Chicano' is a corruption of 'Meshicano', which although once derogatory, serves as an affirmation of both the Native American and the Hispanic origins of the Mexican people (Burciaga, 1993, p. 49). Thus, SICC/SIN were starting up their network while the Chicanos struggled for rural labor reform in the Southwest, the 'golden exiles' were getting themselves established in Miami, and the Puerto Rican and Dominican communities were becoming concentrated in New York.

## The 1970s – a narrowcast national network

'Prior to the 1970 census, the concept of Hispanics as a group barely existed' (Davis *et al.*, 1983, p. 5), even for demographic purposes, let alone in cultural terms. As well as the diversity of socioeconomic and national origins, sheer geographic dispersion militated against any sense

of 'imagined community' (Anderson, 1991). However, before the end of the decade, SICCC/SIN had built itself into a truly national network through the innovative application of the satellite as a new signal distribution technology, which was ideally suited to incorporating these dispersed people into one audience. In 1976, it fully interconnected all its stations and affiliates via satellite so that they could air the same programming at the same time. Furthermore, this programming itself was being transmitted via satellite from Mexico, at first on a weekly basis. This innovation put SICCC/SIN ahead of the mainstream networks, ABC, CBS, and NBC, in being the very first US network to be nationally interconnected via satellite, although SICCC/SIN was pleased to follow the mainstream networks' practice when it then instituted a 'must carry' regime. This meant that SIN could ensure that all the affiliates, as well as its own stations, would function as a national network, carrying the by then daily satellite feed, including commercials, beamed up from Mexico (Sinclair, 1999, p. 100).

This is what we would now call 'global narrowcasting', delivering the signal over a very large territory, but to a small and widely-dispersed specialised audience, in this case distinguished by their use of Spanish. Neither the size of the individual communities reached nor their distance apart mattered, as satellite coverage meant that they could be sold to advertisers as a national audience. However, the linguistic and cultural dimension was crucial to the constitution of that audience.

Univisión (as SICCC/SIN came to call itself in the 1980s) thus acquired a vested interest in cultivating a conception of all peoples of Spanish-speaking national origin in the US having been formed into a vast diaspora, and asserting this as the natural constituency of their network. Anselmo declared that Univisión's 'mission' was 'to unite the Puerto Rican in New York, the Cuban in Miami, the Mexican in San Antonio and the Chicano in Los Angeles through their common Spanish heritage' (*in* Bagamery, 1982, p. 99). But clearly, they had to do that on the economic basis of the predominantly Mexican programming to which they had low-cost access. As Davila (2000) has argued, this has inclined Univisión to foster Mexican Spanish as the hegemonic standard, and at the same time, to cultivate a sense of common, pan-Hispanic 'Latinidad'. The degree to which actual audiences identify with this is another question – Cubans, for example, are resistant to being incorporated under such Mexican hegemony.

## The 1980s – commercialization and competition

Thus, if the 1970s closed with the technical basis being established for a national television audience, the 1980s saw the beginning of the ever more intensive commercial formation of that audience. This process involved advertising agencies and market research companies,

as well as the advent of Telemundo, a rival network to Univisión, backed by mainstream 'Anglo' capital. Government also played a role to the extent that the 1980 Census yielded more reliable data than previously had been available. Whereas the 1970 Census had notoriously undercounted Hispanics, relying as it did on Spanish surnames, national origin, and whether Spanish was spoken at home, the 1980 Census introduced the method (basically that still being used) of asking people if they identified themselves as being 'of Spanish/Hispanic origin or descent' (Davis *et al.*, 1983, p. 6-7).

The Census brought out the kind of demographic patterns that marketers like to see: the Hispanic population was young, growing, and concentrated in geographical regions. This in turn precipitated a whole commercial discourse about 'the Hispanic market', including the first market research studies (Yankelovitch *et al.*, 1981; Guernica and Kasperuk, 1982), and the arrival of advertising agencies, such as Sosa and Associates in San Antonio (Sosa, 1998), that specialized in 'marketing to Hispanics', as a regular feature of the leading trade journal *Advertising Age* came to be called. Roberta Astroff (1997) has referred to these intermediaries between advertisers and the market as 'cultural brokers', who are themselves Hispanics, but there is a class difference which emerges here, to the extent that these people are often college-educated or otherwise in a position to capitalize on their ethnicity in delivering 'racially non-White, linguistically Spanish-speaking, and socio-

economically poor' Hispanics to advertisers (Rodriguez, 1997, p. 284-5).

Indeed, the generally lower levels of education, income and occupational status of the vast majority of Hispanics would have made some advertisers reluctant to embrace them as a new market, as it still does, but these characteristics have always been downplayed in the pitch made to advertisers. Relative to their countries of origin, US Hispanics have been claimed to be 'the wealthiest Hispanics in the world' (Guernica and Kasperuk, 1982), and in any case, have been reported to have other characteristics bound to endear them to advertisers. In particular, they spend much more of their disposable income on food and packaged goods than the general population, and are very conscious of brands, and loyal to them (Strategy Research Corporation, 1986).

We have seen that SIN/SICC/Univisión, the only Spanish-language national network in the US prior to 1986, had a close connection to Mexico, and thus, authentic credentials as being at least one major kind of 'Hispanic'. What was striking about Telemundo, the second network which emerged as its rival at that time, was the fact that it was backed by 'Anglo' finance capital from Wall Street. Small independent Spanish-language stations in all the key markets were acquired and formed into a network. Experienced Hispanic managers were recruited, and programming obtained from a wider variety of sources than the customary fare available on Univisión, giving the new network more appeal to

Hispanics of other than Mexican origin, especially those on the East Coast. The venture was a token of mainstream capital's faith in the new discourse, and marked the emergence of Spanish-language television as an industry.

## The 1990s – crisis and renewal

The 1990s saw the concentration of this industry in Miami. There are various reasons for this, which will be mentioned later in the paper, but it is worthwhile to note the role played by Univisión's reluctance to accommodate itself to the demands of non-Mexican Hispanics. Already in 1987, heavy-handed intervention in Univisión's news service by management from Mexico precipitated a mass resignation of staff who then set up their own company in Miami to produce a news service for the competing network, *Noticiero Telemundo*. Telemundo itself had studios in Miami where it was producing original entertainment programming oriented to US Hispanics, and in 1991, moved its corporate headquarters to that city (Sinclair, 1999, p. 103-104).

Two other major developments in the industry during the 1990s were the expansion of the activities of US cable networks in providing their services in Spanish, and the institutionalization of audience measurement. Leading cable company CNN showed an early interest in exploiting the linkage

between US Hispanic television and Latin American cable markets, first with dubbed entertainment programming, and subsequently with taking over *Noticiero Telemundo*. ESPN began satellite transmission to cable systems in six nations of South America with a Spanish sound track in 1991, the same year in which Time-Warner launched a whole movie channel for Latin America, HBO Olé. As the 1990s progressed, these were joined by Discovery, Cinemax, Fox Latin America, Spelling's TeleUno and Viacom's MTV Latino (Sinclair, 1999, p. 114-115).

The other major transition was the establishment of a ratings service for Spanish-language television. Prior to this, the network owners had not been able to provide the figures needed to convince potential advertisers of the nature and extent of Spanish-language television's reach. This had been a major disadvantage in their competition, not with each other, but with the mainstream networks, because many national advertisers believed (and some still do) that it was sufficient to advertise with the mainstream networks alone, particularly if the audiences for Spanish-language television were unknown.

So, in order to provide the hard data needed to sell the Hispanic audience which they had created to the major advertisers whom they had sought if for, both the Spanish-language networks collaborated in commissioning Nielsen Media Research, the major US audience measurement company, to set up a ratings measurement service for Spanish-language television, the

Nielsen Hispanic Television Index. The first national figures were produced in 1992, and documented Univisión's commanding position, at that time an overall 61 per cent share of the prime time audience (Sinclair, 1999, p. 111).

That same year, the quinquennial year of 1992, was a watershed in the development of both the major networks themselves. Given the high costs of local production and their limited access to Mexican telenovelas, the kind of programming perennially most popular with the majority of the Spanish-speaking audience, Telemundo's uncompetitive position resulted in bankruptcy. At the same time, there was a significant change of ownership at Univisión. Televisa had lost control of Univisión in 1987 when its level of Mexican ownership was found to be illegal, and both the stations and the network were sold to Hallmark, the greeting cards company. In 1992, Hallmark sold Univisión to a carefully-structured consortium which had a majority of its ownership in US hands, but with very significant minority shares being held by Televisa, and also by a major Venezuelan production/distribution company, Venevisión. This arrangement effectively gave both the Latin American companies a guaranteed outlet for their programming in the US, just as it secured a supply of programming for Univisión and consolidated its dominance over the industry in the US (Sinclair, 1999, p. 109-110).

Before the end of the decade, there was also a significant change of hands at the ailing Telemundo, in this case, marking the incursion of

transnational capital into the industry. This took the form of Sony Corporation acquiring about 40% of Telemundo, and AT&T's Liberty Media, about 35% (Hoover's Online, 2001b). This internationalization of the players active in the industry is one of a number of contemporary trends to be considered in the next section of the paper.

## Trends in the new millennium

As the situation appears in the latter half of 2001, there has continued to be internationalization in the US Spanish-language television industry, other main trends being the expansion of the present networks, the diversification of the programming on offer, and the continued concentration of the industry in Miami. There is further internationalization in the ownership of networks taking place, given that TV Azteca, the competitor to Televisa in Mexico and one-time collaborator with Telemundo in the US, has announced that it will participate in a new network in the US. Azteca America Incorporated is a joint venture of TV Azteca with Pappas Telecasting Companies, which owns stations in some key markets, and will control 80% of the company (Press Release, 2000). Meanwhile, Hispanic Television Network (HTVN) is up and running, a US public company listed on Nasdaq, led by an Anglo businessman in Dallas, and distributed by various cable

companies throughout the US (Hoover's Online, 2001a). Both Univisión and Telemundo are expanding themselves, the former having bought the USA Network which it will develop as a second broadcast network, launching in 2002, the latter having taken over GEMS to become its cable network.

There also is some internationalization of production, particularly through the efforts of producers in Spain to penetrate Spanish-speaking markets in the Americas, notably Telefónica Media (Telefónica is a Spanish-based diversified telecommunications corporation, now also owner of the global format-dealing Endemol Entertainment), and Telefónica's domestic rival Prisa. Prisa has been in 'development talks' with Telemundo. Interestingly, from the point of view of program diversification, the Kirsch/Berlusconi Telecinco company from Spain is co-producing a sitcom with Venevisión in Miami, *Radio Pirata*, which 'explores the life of a multicultural group of Latinos working at a Spanish-lingo radio station in Miami' (Hopewell, 2001; de Pablos and Hopewell, 2001).

Further diversification of programming may be evidenced by Televisa's claims that its new *telenovelas* have improved production values, more enlightened cultural attitudes, and less heavily-accented Mexican Spanish, thus responding to common criticisms of their usual output. These will be seen on Univisión. For its part, Telemundo is doing co-productions for the international market with Globo of Brazil, the region's pre-eminent

producer of *telenovelas* (Sutter, 2001).

There is competition for international sources of programming. Following the success of the unconventional *telenovela Betty la Fea* on Telemundo, Univisión moved in quickly to secure the rights to the new series by signing a program agreement with the producers, RCN Televisión of Colombia. Univisión also has a new agreement with RCTV of Venezuela – interestingly, the arch-rival to Univisión's part-owner Venevisión in its home market. Univisión is claiming that these programs will be attractive to the one-third of its audience that is other than Mexican, though it continues to be oriented mainly to the Mexican majority (Calvo, 2001).

The opening of Univisión's second network in 2002 could bring some interesting diversification of programming through linguistic hybridity. Whereas Univisión has kept a strict policy of correct Spanish only on its present network (even advertising slogans have to be rendered in Spanish), there is speculation that the new network might make considerable concessions to the widespread use of a colourful bilingual vernacular often referred to as Spanglish. This would make the network more appealing to younger and less Spanish-dominant audiences. On this score, a more radical approach to English-dominant Hispanics is being tried by Sí TV, an Anglo-managed production company based in Los Angeles which has announced that it will launch a cable network for Latinos, but with programming in English (Sí TV, 2001).

Finally, for a number of reasons, the industry has become even more concentrated in Miami, which is now the base of operations for Univisión as well as Telemundo. Demographically and culturally, Miami is an Hispanic or Latino city, and no longer just for the Cubans, as it is attracting immigrants from a range of other Latin American countries, including wealthy Colombians and Brazilians. Interestingly, US Latino and Latin American celebrities who visit or even have homes in Miami say they like it because they never feel like second class citizens there (Baxter, 2001), suggesting that even in other cities with Hispanic majorities, like Los Angeles, the Anglo cultural hegemony still makes itself felt. Portes and Stepick (1993) have argued that Miami's origins in real estate and tourism were 'economically underdetermined', but its proximity to Cuba made it politically overdetermined in the years of the Cold War. This resulted in the rise of a Spanish-speaking elite able to assert the hegemony of their language and culture over the city in a process of 'acculturation-in-reverse', making Miami 'easily the most "internationalized" of American cities' (Portes and Stepick, 1993, p. 210) This in turn gave Miami a linguistic and cultural basis for developing links not just to the Caribbean but all of Latin America. In conjunction with its geopolitical location, these cultural advantages have enabled Miami to become a major financial and trade center, with

advantageous transport and communication links between the Americas, including for Spanish-language satellite television services and other media, notably music. A clustering effect has led to related audiovisual companies basing themselves in the area (Strover, 1998).

Thus, there have been powerful sociological, political and cultural reasons why Miami has become the media capital of Latin America and its diaspora in the US. However, with regard to television in particular, there are three other, rather more mundane, reasons which have favoured the emergence of Miami as a hub within the global 'space of flows' (Castells, 1996). Firstly, in terms of producing a news service, it is no accident that both Univisión and Telemundo chose to locate their news production in Miami, because the logic of the different time zones across the US requires that news is generated from the earliest, that is, easternmost zone. In principle, it could have been a northeastern city like New York, but Miami's concentration of Spanish-speaking professionals would have been decisive. Secondly, for all kinds of television program production, a major consideration is that Florida is a 'right to work state': that is, employers are not obliged to hire unionized workers, which lowers the cost of labour and makes production cheaper (Brightwell, 2001). In addition, state and county governments offer tax and other incentives to television and film producers in Miami (Miami-Dade County, 2001).

## Assessment and conclusion

We have seen that Spanish-language television in the US is currently going through an apparent boom of interest from new would-be network and cable services, and international program producers. This paper will conclude with an assessment of that boom, and some consideration of the likely shape of the industry in the future, and its capacity to serve the constituency which it seeks to commercialize.

The boom has occurred against a background of widespread fashion for US-Latin American 'crossover' music and its celebrities like Ricky Martin and Jennifer Lopez. Arguably, this trend has somewhat overshadowed the traditional stigma which Hispanic popular culture has had from its association with a disadvantaged group, and this has implications for Hispanic identity itself: 'now it's cool to be Hispanic' (Gaymont, 2001). More substantial has been the release of data from the 2000 Census which confirmed the long-standing prediction that Hispanics would overtake African Americans as the nation's largest minority group.

Certainly, demographic trends give good reason to believe in the future of Spanish-language television. As América Rodríguez (1997) quite correctly argues, contemporary Latin American immigration to the US has characteristics which make it quite distinct from traditional European migration, with its concomitant

expectations of assimilation into the mainstream after a period of adjustment (Rodríguez, 1997, p. 289). Univisión (2001) agrees, listing these factors about Hispanics: the majority of adults were born outside the US; their influx is ongoing; they are geographically concentrated and tend to preserve their cultural identity; and they can easily travel back to their country of origin and maintain communication with each other.

The Census and social science research bear these out: in 2000, 51% of the foreign-born population in the US was from Latin America, and 39.5% of them had entered the US during the 1990s (US Census Bureau, 2001b). Thus, in addition to the rapid natural increase in the population of Hispanics in the US, their total numbers are constantly being swelled by recently-arrived adult immigrants. Their Spanish-dominance not only makes them likely members of the audience for Spanish-language television, but increases the critical mass of Spanish speakers in the population at large, particularly since they tend to be geographically concentrated. For these reasons, they can so resist assimilation, and maintain the strength of Spanish. Furthermore, studies such as that of Roger Rouse (1991) indicate that the geographical proximity of their countries of origin allows many of these migrants to come and go in a whole 'continuous circulation of people, money, goods and information' which make up today's 'transnational migrant circuit' (Rouse, 1991, p. 14). It is at this point that we begin to see the value in conceptualizing the US Hispanic

population as a kind of diaspora.

However, there are limits to which a wholly commercial Spanish-language television industry is truly able to serve the interests of this diaspora as a whole. It would be apparent that the traditional economics of the industry favours the use of cheap imported programming oriented towards the most recently-arrived, Spanish-dependent, predominantly Mexican immigrant. Yet the mode in which 'the Hispanic audience' is addressed seeks to play down this bias, and interpellates Hispanic peoples universally as if they were untouched by the realities of ethno-national, socioeconomic, and other differences. In particular, many of the more affluent and established people of Latin American origin are English-dominant or totally bilingual, but the industry has a vested interest in ignoring them, and rather, defining its audience as 'othered' by its use of Spanish (Rodriguez, 1997, p. 290-293). This façade is necessary for the production of an Hispanic audience, and for the sale of that audience to advertisers, the industry's whole commercial rationale.

Yet even in the era of audience measurement, the industry has continued to have difficulties in convincing advertisers of the value of advertising specifically to Hispanics. Nielsen data shows that although 90% of US Hispanics speak at least some Spanish at home, only 32.3% speak mostly Spanish, and 20.4% only Spanish. This totals a bare majority of Hispanic adults as Spanish-dominant. Thus, even in the leading network's own publicity, Univisión claims only 27.4% of total

viewing in Hispanic households, with 7.1% going to rival network Telemundo – the remaining viewing is by far the majority, 71.5%, which is of English-language mainstream network and cable television (Univisión, 2001a).

Thus, even with having 85% of the primetime audience for Hispanic network television, Univisión can quite rightly claim that their real competition is not Telemundo, but the four mainstream networks (Gaymont, 2001; Univisión, 2001b). Furthermore, in spite of the success of both Hispanic networks in attracting major national advertisers over the last decade, many the same as advertise on mainstream television, they have not been able to command the same rates – in fact, for Hispanic viewers, these advertisers only pay around half of what they pay to advertise on the major networks (Rodriguez, 1997, p. 296).

To return then, finally, to the assessment of the current boom, it would not appear that the structure of the industry is likely to change for the immediate future. Even if all the projected new networks do proceed to be launched, Univisión's position within the Hispanic market seems to be unassailable, given its several competitive advantages, not the least being both access to imported programming and capacity to generate programming of its own. With the backing of Sony and Liberty media, Telemundo has been saved from bankruptcy, but has not been able to win substantial audience share from Univisión.

Apart from Univisión's pre-eminence, the market itself is not big enough to bear the competition of

new entrants, as it has proved itself unable to attract advertising revenue commensurate with its share of total viewing. Some new entrants might be able to offer more choice and promise to be more responsive to the communication needs of Hispanics not now served by Univisión, but it is hard to see how that can be sustained so long as television for even such a substantial minority as the Hispanics is run on an exclusively commercial model.

At the very least it can be said that, in spite of its commercial *raison d'être* and inherent limitations, the Spanish-language television industry is one US institution which has recognized the significance of, and has begun to engage with, the fundamental demographic, cultural and linguistic transformation which the diasporic flow of Latin American immigration has brought to the US.

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