

FocusON Research

The U.S. Beats Spain... And Others

A new [study](#) from the Instituto Cervantes reveals that the U.S. is the second largest Spanish-speaking country after Mexico, which has 121 million.

Today there are 41 native speakers in the U.S. and another 11.6 million who are bilingual. This puts the U.S. ahead of Colombia (48 million) and Spain (46 million) and second only to Mexico (121 million).

The report, *El español, una lengua viva*, estimates that there are 559 million Spanish speakers worldwide, a figure that includes 470 million native speakers and those with some command of the language.

Data from the U.S. Census Bureau suggests that the U.S. will have an estimated 138 million Spanish speakers by 2050, making it the biggest Spanish-speaking nation in the world.

The U.S. Hispanic Data Gallery reports that New Mexico is home to the highest population of Spanish-speakers in the U.S. with 47 percent of its residents fluent in español.



California and Texas are next in line with 38 percent, followed by Arizona (30 percent), Nevada (27.3 percent) and Florida (23.2 percent). In New York, an estimated 18.2 percent of residents can speak Spanish.

The lowest concentrations of Spanish-speaking residents are located in West Virginia (1.3 percent), Maine (1.4 percent) and Vermont (1.6 percent). In Alaska, roughly 6 percent of the population speaks Spanish.

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If you are currently investing
in the emerging Hispanic markets;
It's Time to add one more to your buy:

SOUTHWEST FLORIDA

Dollar per Dollar we will efficiently deliver over **200,000 HISPANICS** residing in
SARASOTA, BRADENTON, POLK COUNTY, PUNTA GORDA, PORT CHARLOTTE,
SEBRING, ARCADIA, AVON PARK, WAUCHULA and VENICE BEACH.

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Market Snapshot: Tampa-St Petersburg

Outpacing a flat non-Latino population, the number of Hispanics calling Florida's Tampa-St. Petersburg market is in overdrive. Today, Latinos account for 18 percent of the county's total population, according to data from Geoscape International, American MarketScape DataStream: 2014 Series.

The DMA currently hosts a total population of over 4.5 million and the Hispanic population increased by 127 percent between 2000 and 2014. By contrast, the non-Latino population gained a mere 0.5 percent.

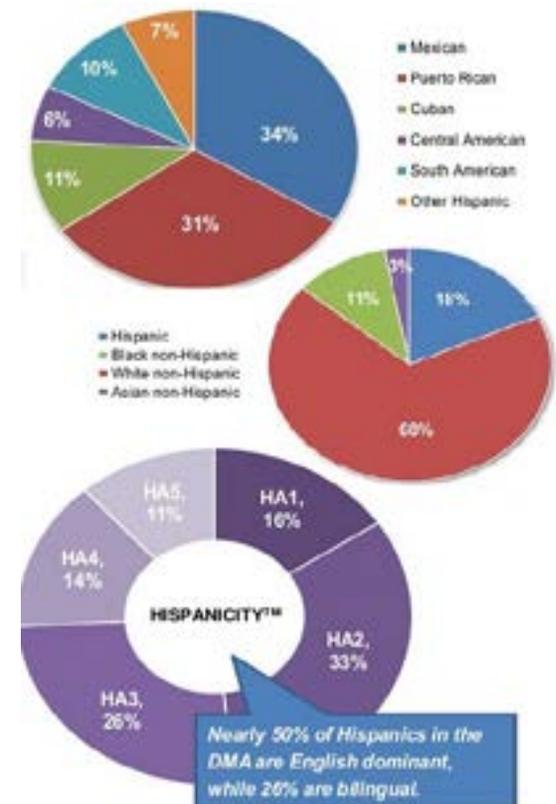
Other multicultural residents are also increasing their presence in Tampa-St. Petersburg. During the same period, the Asian population increased 118 percent growth and today represents 3 percent of the total. The number of African-Americans grew 39 percent from 2000 to 2014 and now accounts for 11 percent of the market's total.

The majority of the Hispanic population is of Mexican (34 percent), Puerto Rican (31 percent) or Cuban (11 percent) descent. There are smaller pockets of Central and South Americans as well as other Latinos.

Acculturation levels among Hispanics in Tampa-St. Petersburg are very high, with 75 percent speaking little or no Spanish and maintaining few Hispanic cultural practices and 26 percent as fully bicultural. The majority of Hispanics describe themselves as:

- "Americanizado" (16 percent) – English-dominant, third generation U.S. born, with few Hispanic cultural practices
- "Nueva Latina" (33 percent) - English-preferred, second generation U.S. born, with some many Hispanic cultural practices
- "Hispano" (14 percent) – Spanish-preferred, speaking some English, immigrant who arrived as an adult more than a decade ago, with predominantly Latino cultural practices
- "Latinoamericana" (11 percent) – Spanish-dominant speaking nearly no English, immigrant who arrived as an adult less than 10 years ago, with primarily Hispanic cultural practices

Geoscape Intelligence System (GIS) and the American MarketScape DataStream™ Series 2014 and Consumer Spending Dynamix™ Series 2014.



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FocusON Commentary

How Collaboration Can Drive Real Integrated Marketing

By *Gustavo Razzetti, Managing Director of Lápiz*

There's a huge gap between fantasy and reality when it comes to agency collaboration. One of my clients could not believe how collaborative agency partners appeared when she was in the room, yet were so dysfunctional the minute she left for coffee. Someone would always come along to use that moment to poach another agency's assignment. "We can do it better, faster and cheaper," they would say in a somewhat predictable sales pitch.

It's no surprise, then, to hear that 62 percent of clients view their agencies as suppliers, not partners, and that many marketing executives say their agencies are more interested in selling their work rather than solving their problem (62 percent and 56 percent respectively, according to the [Naked True study](#)).

What's Killing Cross-Agency Collaboration?

More than two-thirds of client-side marketers agree that integrating all marketing activities across channels is crucial, yet just 10 percent say their messaging, execution and delivery are aligned across touchpoints, according to eMarketer. In order to improve that output, they need to solve the input: how agency partners work together. Lack of clarity, maturity and trust among partners doesn't help, but neither do the current rules of engagement. Here are some that need to be revisited:

- *The "best idea wins" approach.* Having your PR, Media,

Digital and Creative agencies competing against each other shifts focus. Everyone is seeing the other as competitors. Going back to my client anecdote, they are fighting against each other rather than helping to beat the real competition: that of the client's.

- *Expecting agencies to just figure it out.* A clear process on how to work together and develop integrated platforms is the foundation of true collaboration. Clients need to provide distinct rules of engagement. Assigning deliverables (who does what) is not enough.
- *Compensation based on individual performances.* If you want a team to behave like a team, reward them like a team. When only the winning agency partner – the one who created the approved idea – gets paid, we are letting financial agendas get in the way of collaboration.
- *Expecting collaboration at the top.* While it makes sense to discuss the importance of cross-agency collaboration with senior leaders among agency partners, that's not where the solutions will come from. They are not wired that way nor involved in how the work is actually developed. Collaboration should happen at the team level.
- *The big idea that can be expanded across Good integration should be at the core of the idea, not an afterthought.* The era of TV-led campaigns is over. Consumer participation and holistic planning should happen when the platform is being developed, not after the fact.

From AOR to a Collaboration Agency Model

In an era of open source and collaboration, hierarchies,

agency snobbery and self-centered perspectives no longer make sense. It's time for marketing service agencies to embrace a new mindset.

We need to stop seeing collaboration as a threat to our egos, and instead see it as a way to thrive in a more complex consumer and media landscape. Here are some thoughts:

- *Real collaboration requires (early) alignment.* Participating partners need to kick off an assignment with a shared vision on the challenge they are trying to solve. One single agenda should lead everyone's passion. Clear roles and responsibilities are important, but with the freedom to allow proactivity beyond specific areas of expertise.
- *Let go of power, empower people instead.* The AOR model is built on the notion of efficiency (less cost, one voice, more coordination) but also has more of an assembly-line feel, better suited for the past. Brands that are always-on need a cross-agency collaboration that is always-on too. The new model requires ongoing conversations around strategy, creativity, media and technology happening in real-time rather than in isolation.
- *Collaboration is a team sport, not an organizational one.* Think more of a lead team rather than a lead agency. It's about bringing together the brightest minds that every partner has assigned to a specific project. Embrace diversity of thinking versus limiting people to their actual area of specialization.
- *Establish a clear collaboration process.* Right mindsets and behaviors don't simply happen, they need to be coached. Collaborative processes, such as Design Thinking, ensure you involve the right people at

FOX DEPORTES DELIVERS A STELLAR MLS RETURN



SEASON OPENERS

TOTAL VIEWERS

+233%

VS 2011

P18-49

+291%

VS 2011



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Source: NTL Live+Same Day Program averages for 2015 (3/8/15); NHLH Live+Same Day Program averages for 2011 (3/15/11-11/6/11). Subject to qualifications

the right time, building on different perspectives to develop richer solutions towards one shared goal. From understanding the user to providing strategic direction all the way to ideation, planning and execution.

- *Reward the team, not individual organizations.* Reward the behaviors you want to happen. Think of incentive models that reward all the partners involved based on collective integrated marketing goals (business, marketing and collaboration) rather than individual achievements.

FocusON Digital

Sling TV Launches Streaming Service En Español

Sling TV, a video streaming service that allows users to watch live TV without cable, has announced the launch of its new Spanish-language brand, "Sling Latino." This standalone service that can be viewed through smart TVs, digital media players, and apps, is marketed towards that audience of people who are interested in having access to channels solely en español.

In an effort to offer Spanish-speaking and bilingual viewers more choices in TV content, Sling Latino offers basic standalone packs ("Paquete Total" with 22 channels for \$12 per month, or "Paquete Esencial" with 16 channels for \$7 per month) and multiple add-on packs for its users to pick from.

Sling Latino incorporates different content for its online offerings, including channels such as Univision, Galavisión, Azteca America, and BeIN Sports, as well as various movie and soap opera channels.

Sling Latino manager, Jose Romero, notes that, "Having broadband access to the Internet is a requirement to be able to enjoy the product correctly. The second thing is the needs of the customer. Many people normally watch five to 10 channels and they have noticed that Sling offers them this." 2014 Nielsen ratings show that in that year, of the U.S. households that had access to over 185 channels, viewers only watch an average of 17 of them, thus paying for many more channels than they use.

Sling Latino requires no long-term contract, no credit check, and there are no hidden fees. There is no installation or installation fee required other than a simple app download. New customers can try Sling Latino free for seven days, and all customers will be able to view the new Sling Latino standalone services and add-on packs on all Sling TV-supported devices.

"Whether viewers are solely interested in Spanish-language programming or are looking to supplement an English lineup with a few Spanish channels, Sling Latino is a flexible, affordable and mobile way to connect viewers with the best of Latino programming," says Sling TV CEO, Roger Lynch. "Providing this connection remains fundamental to who we are, and we have been eager to give Hispanic viewers a new and contemporary way to watch Spanish-language TV."



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Hispanic Market Works is published every Monday by Solmark Media Group, Inc. HMW has no connection to any other existing newsletter, media group, agency, advertiser, researcher or network. The editors are solely responsible to their readers and to themselves.

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Launched March 24, 1997, HMW has been chronicling breaking news in the Hispanic marketing and media industries every week. For our editorial pledge please visit www.hispanicmarketworks.org