

Media Market Research on Immigrant Audiences: Lessons Learned From a Critical Analysis of the Spanish Media Survey

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Immigration has become an increasingly significant social phenomenon in Spain. The immigrant population has proven to be a potentially powerful target audience for advertisers. However, media research concerning immigrant audiences in Spain is still developing. The objective of this paper is to identify the most common difficulties encountered in immigrant-related media research, and to make recommendations regarding how advertisers and media planners can design and implement an effective media survey to investigate immigrant audiences. In this context, we consider the Spanish General Media Survey (EGM) as an instructive case study and analyze its methodology and data.

Keywords: audience research, immigration, media survey, advertising, Spain

Introduction

Immigration has become an increasingly significant social phenomenon in Spain since the turn of the 21st century. About 25 years ago, Spain changed from a region of emigration to a region of immigration as increasing numbers of people come to work in its growing economy (Gabardo, 2009; Koser, 2007). In 1992, immigrants made up 0.92% (360,700) of the Spanish population; by 2011, that figure had increased to 12% (5.7 million), as Figure 1 shows.² From a business standpoint, this growing population of immigrants could contribute to the economic growth of media companies and advertisers by increasing the number of potential customers (Alvarez et al., 2009; *The Economist*, 2011).

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² The official figures for immigrants in Spain are given by the National Institute of Statistics. It takes into account the Continuous Municipal Register ("Padrón"), which offers data on the number of foreigners in Spain, including both regular and irregular foreign residents, as we will explain in the section "Immigrant Data in Spain."

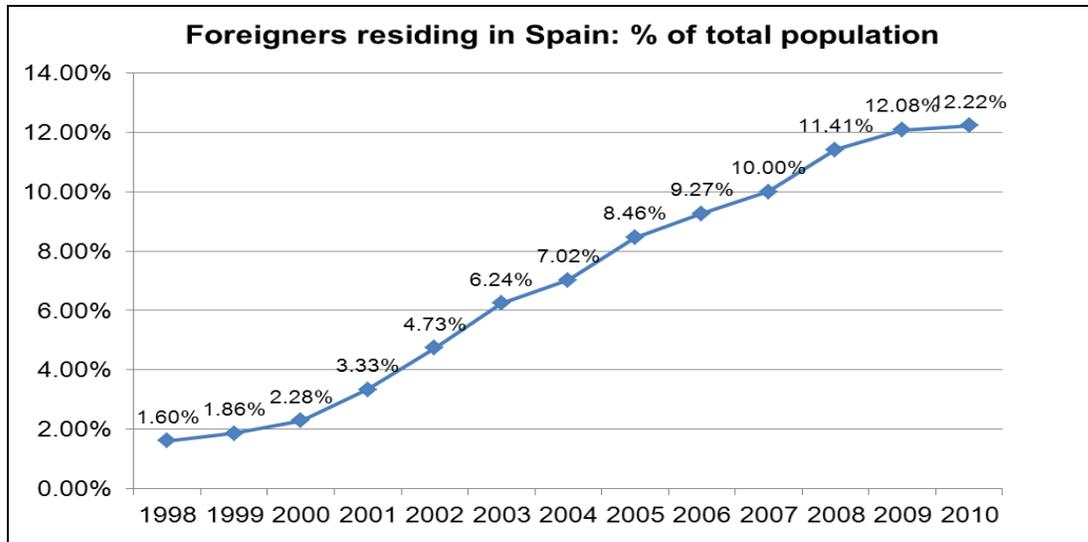


Figure 1. Evolution of the percentage of foreigners in Spain from 1998 to 2010.

Note: Elaborated with data from the Spanish National Institute of Statistics, which treats data pertaining to the percentage of foreigners in the country as an indicator of immigration.

For these reasons, media outlets have started to focus on this group, not only by addressing relevant issues in news coverage, but also by producing content that targets this population and launching new media that center on immigrants. In the television sector, for example, the public TV channels RTVE and CCRTV developed programs focused on issues affecting immigrants and of interest to them (Medina, Herrero, & Frago, 2011). However, private television channels have not produced much content for immigrants because, among other things, they do not have the tools to measure the immigrant audience accurately.

Advertisers are another set of actors in the media market that have begun to pay greater attention to immigrants as a group, especially advertisers in the telecommunications, food, banking, and finance sectors (Clemente, 2005; Alvarez et al., 2009; Baladron, 2009).

The fact that media outlets and advertisers have started to show greater interest in immigrant populations prompts the need for further study of their status as consumers and audiences. The most significant study in this regard is *Studies on the Media for Immigrants (EMI)*, whose first edition was sponsored by the Association for Awareness of the Immigrant Population (ACPI) and published in 2007. Since 2006, Etnia Communication has been carrying out an analysis of the consumption and the sociodemographic profile of the "migrant" group in Spain, focusing on the Romanian and Bulgarian populations; this analysis is published in the *Yearbook on Immigrant Communication in Spain*. In 2009, Havas Media launched a study of the immigrant population based on economic and sociodemographic

variables and media consumption, entitled *The Communication Yearbook*. Finally, the European research group Minority Media, based at the University of Poitiers, in 2009 compiled a directory of the media companies created by and for immigrants in Spain.

However, these studies cannot be regarded as comprising an efficient decision-making tool for media planners and advertisers, because the information given was incomplete, patchy, and out of date. Most of them are not conducted for commercial purposes and are not necessarily carried out every year. Advertisers need more frequent data (Chaves, 2005; Madinaveitia, 2005). According to Lee and Tse (1994, p. 5), "How these ethnic immigrant consumers use mass media and to what extent they are influenced by exposure to mass media are important to advertising media planning, creative executions, and other strategic decisions."

The availability of timely and reliable sources of information is also crucial for media management. As Bogart (1995) noted, decision-making in media companies is determined by audience considerations. Thus, audience research is especially significant for media managers, advertisers, and programmers when they want to invest in advertising or to sell commercial slots, but also to meet audience needs and satisfy public demand (Rodriguez, 1997; La Ferle & Lee, 2005; Balnaves, O'Reagan & Goldsmith, 2011; Berné, García-Uceda & Orive, 2013). As interest in immigrant audiences is increasing among advertisers and media managers, the need for accurate data for effective decision-making is likewise greater.

In Spain, the most prominent source of audience data is the EGM, the General Media Survey (AIMC, 2005). Multimedia planners use its quantitative data to justify their media investments. The EGM measures the audiences of newspapers, magazines, radio, television, cinema, and outdoor advertising. So it provides the basic audience data for the media market and helps to set prices for media advertising time and space.

Since advertisers and media managers in Spain tend to base their decisions on the EGM data, the survey's failure to represent immigrants as a group may mean that advertisers and media outlets do not get relevant data about media consumption and, as a result, media planning decisions could be off target. The main purpose of this paper is to review the EGM methodology and data so as to make recommendations that will lead to improvements in immigrant audience research. This paper highlights problems mostly concerned with market research, not with the meaning of media in immigrants' lives, representation of immigrants in media, or identity issues.

The main difficulties involved in immigration research, with a particular focus on surveys, should be addressed before analyzing the EGM methodology. Three key aspects are taken into consideration: firstly, the definition of immigrants for the purposes of the survey; secondly, problems related to research methodology, including the design of questionnaires and the use of different languages; and, finally, problems with the analysis of media consumption data obtained from the survey.

To do this, a review of the research literature relating to difficulties in immigration research in general and in the media sector in particular is presented below. The case of the EGM is then explored to

discover whether immigrant media audiences are studied effectively. Understanding how a professional survey overcomes such difficulties may provide useful insights for future media studies involving immigrant populations.

Immigration Research

The literature about immigrants as a media audience reflects the difficulties involved in analyzing this target group from the market research perspective. The problems are organized into three sections: the definition of *immigrant*, the survey methodology used, and an analysis of media consumption data.

Definition of Immigrant

Every research survey should start with a definition of the universe of the study. In this regard, the definition of *immigrant* is crucial for immigration research. There are different criteria for defining immigrants, such as being a foreigner, by nationality or citizenship status, time living in a country, residential tenure, or being of foreign descent or a member of an ethnic minority (Camarota, 2003; Feskens et al., 2006). The lack of a common understanding confirms the need for a clear initial definition to identify the research target.

The United Nations opts for the term "international migrant," defined as a person who stays outside their usual country of residence for at least one year (Koser, 2007). According to this definition, survey researchers should ask for the year of entry to the country, a question that is not always included in such surveys (Duque, 2011), or which often generates incorrect responses because immigrants fear the possible implications of their answer (Camarota, 2003). Therefore, questions about a person's nationality or citizenship, whether she or he was born abroad, or whether her or his parents were born abroad are easier to ask than a question about an immigrant's year of entry (Duque, 2011; Feskens et al., 2006). This makes any combination of the former questions preferable to the latter for the purpose of identifying and describing an immigrant. The advantage of nationality or country of birth is that both data are easy to collect and internationally comparable (Feskens et al., 2006).

In the field of audience research, there is also a wide variety of terms used to denote immigrants (e.g., Awad, 2013; Horsti, 2008). In some audience research undertaken by advertisers and media managers, the research population is defined in such a way that not all immigrants are included for the purposes of the study (Santiago & González, 2011). In the measurement of television audiences in Germany, for example, the head of the household must be from the EU, and therefore many immigrants from other countries are excluded from the universe of media research. In Switzerland, immigrants are included only when they have residency, a criterion that also excludes a significant number of immigrants. And in the Netherlands, research takes into account only immigrants from certain countries, such as Turkey, Morocco, the Netherlands Antilles, and Surinam (Santiago & González, 2011).

These restrictive rules lead to the omission of many immigrants from the reference population, confirming their poor representation in audience measurement systems. In many cases, the organizations paying for data determine the population taken into account. If media and advertisers require the

inclusion of a specific group because it could be a new target for their markets, they should demand that audience research companies include it in their studies.

As noted above, time living in the country is a relevant criterion for defining immigrants, but it is a piece of data that is difficult to gather correctly (Camarota, 2003). However, some media studies have shown that this information is relevant for studying immigrant audiences because, depending on the time a person has spent living in a country, her or his media consumption can change (Chaves, 2005; Madinaveitia, 2005; Matsaganis et al., 2011). According to Lin et al. (2010), new immigrants tend to consume ethnic media as opposed to mainstream media. According to Matsaganis et al. (2011), people who intend to spend only a short time (two to three years) living in a country tend to focus on home country news and content, but those who stay longer are more motivated to adapt their behavior toward the host country and make use of host country media.

Another point in the definition of *immigrant* is the inclusion of first- and second-generation immigrants, who tend to have different media consumption patterns, also related to the time living in the country (Lin et al., 2010). So, if different generations are to be compared, it is necessary to know where the interviewees and their parents were born.

Martínez and Vizcaíno-Laorga (2008) hold that among the reasons for the relative lack of research on media consumption among immigrants is the issue of irregular status in general and illegal employment status in particular. One reason may be that foreign respondents living in a country illegally are more reluctant than other foreign respondents to participate in a survey (Camarota, 2003). This should be taken into account in immigrant audience research.

In brief, citizenship and country of birth are relevant criteria for defining the universe of immigrants and they are recommended for immigrant audience research because they are easier to collect (Feskens et al., 2006). However, time spent living in the host country and the nationality of parents may also be significant factors in the definition of immigrants, so they should be included in the survey of media use among immigrants. These factors complete the map and enable the comparison of groups and patterns of media consumption.

Survey Methodology

There are two key aspects to research methodology in relation to immigrant populations: the data collection technique and the language used in data collection.

Since audience measurement for media companies and advertisers involves surveys, we will analyze the benefits and limitations of the different methodologies used in survey research among immigrants, especially in the field of audience research.

A number of research papers draw on personal interviews (Pacheco, 2007). One of the benefits of face-to-face interviews is the reliability of the information generated because the interviewer can explore ambiguities in the answers. It is a good methodology for situations that may need explanation and

clarification due to possible linguistic misunderstandings, for example. This method also enables the use of visual aids, such as cards with options or pictures (ESOMAR, 2008). The personal interview also has a better response rate than other methodologies, with substantially and consistently lower figures of nonresponse among foreigners (Camarota, 2003).

Conducting both face-to-face and telephone interviews is also possible for immigrant research. Connor and Massey (2010) conducted both, yielding a sample of 8,573 Latino households in the United States and Spain with a response rate of 68%. Feskens et al. (2006) also recommend the telephone interview as part of a mixed-methodology design, combined with personal interviews. Foreign-born individuals with low income, low educational level, and poor local language skills are more likely to respond to a personal interview (Camarota, 2003).

As well as methodology, the use of other languages is important in engaging immigrants. In every immigrant survey, a selection of languages should be included to encompass members of different minority groups (Laganà et al., 2011). In the case of media studies, the research organization involved in the Wilkin et al. (2009) study in Los Angeles trained bilingual interviewers to conduct the survey in the preferred language of the respondents (English or Spanish). Lin et al. (2010) used five languages to cover the main population groups in Southern California: Cantonese, English, Korean, Mandarin, and Hispanic.

The use of immigrant languages is also the key to improving cooperation and reducing nonresponse bias (Keeter et al., 2000; Camarota, 2003). When the first contact is made in the dominant language of the host country, the response rate and quality of data may decrease and the representation of minority groups may be affected (Camarota, 2003; Harzing, 2005; Laganà et al., 2011).

But the use of additional languages may also be problematic. First, translating questionnaires can be a costly operation (Feskens et al., 2006). In addition, the questions must be translated accurately and the interviewers must be properly trained (Camarota, 2003). Thus, including different languages can be more difficult and expensive.

In light of the experience of international researchers, it may be concluded that the face-to-face interview is the most advisable methodology for surveying immigrants and, although costs may increase as a result, the inclusion of more languages is recommended so as to lessen nonresponse.

Analysis of Media Consumption Data

Two factors ought to be taken into account regarding immigrant audience data: the value of ethnically targeted media³ and the different target groups of immigrants.

In studies of immigrant media audiences, researchers have paid significant attention to ethnic media. While such media outlets are important for immigrants (Arbitron, 2009; Georgiou, 2003; Lin et al.,

³ "Ethnic media are often regarded as media *by and for* ethnics in a host country with content in ethnic languages" (Shi, 2009, p. 599).

2010; Retis, 2011), this group also consumes the media produced in the country of settlement (Dhoest, 2009; Pacheco, 2007; Soriano, 2010); therefore, it may be interesting to include all types of media in the analysis of immigrant audiences.

Media consumption analysis of immigrant audiences tends to focus only on groups that are identified by a single home country and/or a shared language. That is the case of Hispanics in Texas (Shoemaker et al., 1985), Hong Kong immigrants in Canada (Lee & Tse, 1994), Latino Americans in Catalonia (Huertas, 2009), and Venezuelan immigrants in South Florida (Shumow, 2010). The immigrant population is a set of very different groups, each with its own specific sociodemographic characteristics and particular culture, which shape the goals that these groups seek to achieve through media consumption. Therefore, the study of immigrants by a single home country and/or a shared language is recommended.

The Case of Spain and the EGM

The purpose of this section is explore how the three areas of difficulty involved in immigrant audience research cited above may be addressed, using the General Media Survey (EGM) as a case study. As previously mentioned, the EGM is the biggest media audience survey in Spain and one of the most commonly used for making decisions in the advertising market. The objective is to analyze an existing study that includes immigrants to see how it confronts problems and to identify possible improvements and best practices.

Before addressing these points, the sources of official data on immigration in Spain are presented, so as to clarify what definitions of *immigrant* are used in public sources and to compare them with the information provided by the EGM. The validity of the EGM immigrant data depends on the degree to which it corresponds with data from those official sources, as we explain below.

Immigrant Data in Spain

The official figures for immigrants in Spain are given by the National Institute of Statistics (INE) and the Ministry of Labor and Home Affairs. This ministry includes only foreigners with a registration certificate or residency card. The INE, along with the Continuous Municipal Register ("Padrón"), offers data on the number of foreigners in Spain, including both regular and irregular foreign residents. Since 2000, free medical care and free access to the public education system have been given on condition that the person is registered as a resident of Spain in the Continuous Municipal Register (Gabardo, 2009; Law 4/2000). Accordingly, these data have enabled a relatively accurate census of foreigners living in Spain (Santiago & González, 2011).

In order to complete the picture of immigration, the INE carried out the National Immigrant Survey in 2007. Its target population was defined as "individuals born abroad, 16 years of age or older and resident in Spain for at least a year, or having resided less than a year but with the intention of staying, excluding people born abroad who held Spanish nationality and had moved to Spain before 2 years of age" (Duque et al., 2013, pp. 73–74). This definition permitted inclusion in the target population

of flows of recent immigrants who had acquired Spanish nationality. However, it had two main shortcomings: First of all, it included Spaniards born abroad who spend occasional periods in Spain. Secondly, it excluded second-generation immigrants (Duque et al., 2013).

The National Immigrant Survey offered an interesting picture of immigration in 2007, but the official continuous data comes from the "Padrón," which is also used to define samples in immigrant surveys (Duque et al., 2013).

Thus, in Spain, the official figures for immigration are data of foreigners living in Spain and registered in the "Padrón," which enables access to free medical care and public education. Hereafter, therefore, the terms "foreigners" and "immigrants" are used interchangeably.

If the EGM data about immigrant groups are not similar to the figures regarding immigrant population provided by the "Padrón," this media survey will have to be refined because it would indicate a conflict in immigrant numbers in Spain.

The EGM

The EGM constitutes the most complete database of media consumption at local and regional levels in Spain. It is the cornerstone of the work carried out by the Association for Media Research (AIMC⁴) and its most ambitious study.

The AIMC includes all parties interested in audience data: media outlets, advertisers, advertising agencies, and media or commercial communication agencies. It is organized as a "joint industry committee," ensuring transparency and equal access to data. "The consensus of all the parties involved is necessary so that the information achieved will be considered valid and accepted by all" (AIMC, 2013). The members agree on which methodology is to be applied and to share costs.

The methodology used in the EGM encompasses 30,000 annual face-to-face interviews (with tablet assistance) asking about all media (newspapers, magazines, radio, television, cinema, Internet, and outdoor advertising) along with telephone surveys for some media outlets in particular (AIMC, 2011).

The sampling process comprises several stages. First of all, stratified sampling is applied, with the regions⁵ as strata and calculating sample size proportional to the population in each region. In the

⁴ Asociación para la Investigación de Medios de Comunicación (vid. <http://www.aimc.es/-What-is-AIMC-.html>).

⁵ The 17 regions included are all the "Comunidades Autónomas" of Spain (vid. <http://www.aimc.es/-What-is-AIMC-.html>).

second stage, census tracts are randomly selected. Households are then selected by random-route sampling⁶ and, finally, individuals are chosen by simple random sampling (AIMC, 2011).

Any media company that wants to access the EGM data must join the AIMC and pay for it. Additionally, the newspapers included must be published daily, and magazines weekly, biweekly, or monthly. Therefore, the EGM does not supply audience data to all media brands, but only to those associated with the organization and those that meet its conditions.

As noted earlier, media outlets and advertisers in Spain make decisions based on the EGM data, and if the EGM survey fails to represent immigrants as a group, advertisers and the media will not be able to avail themselves of relevant data about their media consumption and, as a further consequence, media planning decisions may be misdirected.

To assess whether or not the EGM accurately measures the immigrant audience, the three key areas outlined above are now addressed here: the definition of *immigrant*, research methodology, and media consumption data. The "Padrón" data are used in the discussion in order to assess the representativeness of immigrant groups in the EGM.

Definition of Immigrant

In the EGM, the universe is defined as "individuals, 14 years old and over, living in single-family homes, in mainland Spain, and the Balearic and Canary Islands" (AIMC, 2011).⁷ In this way, the audience for the general population is measured, as requested by media market agents.

The reference data for the size and distribution of this population comes from the INE. An individual does not need to have Spanish nationality to be included in the EGM universe. Hence, people born in other countries are included. In addition, the inclusion of a question about nationality in the questionnaire enables analysts to see the number of foreigners in the sample. The question was included from 2002 onward in order to learn more about media consumption in the immigrant population (AIMC, 2004).

A significant drawback of the EGM data is the lack of information about foreigners who have acquired Spanish nationality (a problem that emerges from operationalizing the concept of "immigrants" as "foreigners") and the children of immigrants (i.e. second generation of immigrants). Since the EGM does not encompass these data, it is impossible to tell whether those who assert Spanish nationality in the survey are Spanish by birth or because they have been granted national status after living in Spain for

⁶ "Random-route sampling is also known as "random walk." The field interviewer starts at a specified point, which is randomly chosen, and calls on the households that fall at set intervals" (Bradley, 2013, p. 163).

⁷ In the EGM, travelers on holiday or people living in institutions or other group quarters (prisons, nursing homes, monasteries, convents, etc.) are not considered part of the universe. Since they are not a target for many advertisers interested in the EGM data, they have not been included in the universe.

some time. It is likewise impossible to explore the media consumption habits of second-generation immigrants, as they may be officially registered as Spanish nationals. The presence of second-generation immigrants is a relatively recent phenomenon in Spain (Duque et al., 2013) and therefore they are not represented in the EGM sample. However, this population is likely to grow over time and become a significant audience group, as is the case in other countries with a longer history of immigration.

So, immigrants are included in the universe of the EGM, and they are recognized by nationality. However, the EGM survey does not include a question that makes it possible to capture the length of time an immigrant has lived in Spain or the nationality of a survey participant's parents so as to identify second-generation immigrants. Research has shown that both these factors affect media consumption.

Survey Methodology

The EGM data comes primarily from face-to-face surveys. The reasons for using this methodology are that it is a lengthy study and some questions require visual aids such as cards with images of newspapers and magazines. For that reason, the use of personal interviews is more convenient and, as we have seen in the literature review, it is the most recommended methodology for immigrant survey research. Its main disadvantage as a research methodology is that it is expensive.

The EGM collects information for some media using telephone surveys (AIMC, 2011). As noted above, this method may cause some problems for immigrants, because they may misunderstand the questions due to language difficulties. However, the EGM complements the telephone survey with personal interviews, as the literature recommends.

Moreover, the kind of telephone must be established. According to EGM's own figures, in 2010, 99.8% of foreigners interviewed had telephones. This high rate may support the use of telephones for contacting this group. However, 45.24% of them had only a mobile device (see Figure 2), so calling this type of telephone is important for reaching immigrants. Whatever the case, telephone surveys must be complemented by face-to-face interviews.

The importance of using more than one language to reduce the nonresponse rate in surveying immigrants was cited above. In 2007, the National Immigration Survey in Spain (INE, 2009) used six languages: Spanish, English, French, German, Arabic, and Romanian. This range of languages enabled interviews with foreigners from the 10 most common countries of origin, which comprised almost 60% of the total number of foreigners living in Spain in 2011, according to the official figures (see Table 1).

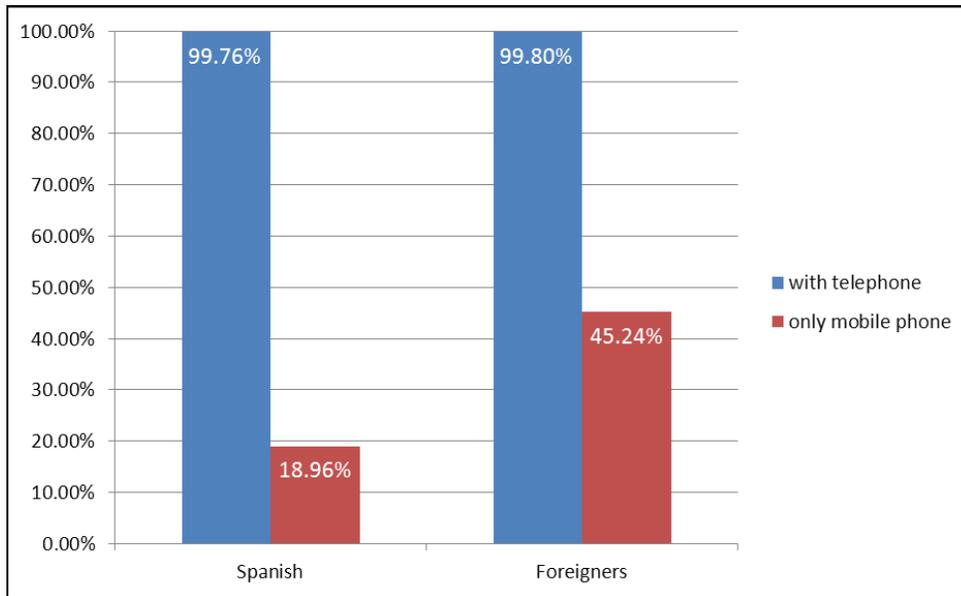


Figure 2. Percentage of people with telephones for the total group: Spanish people versus foreigners.

Note: Data from the EGM in 2010.

Table 1. Foreigners in Spain, 1/1/2011. Data by Main Nationalities.

Nationality	Population	% of total foreigners
Romania	809,409	12.2%
Morocco	766,187	11.5%
Ecuador	478,894	7.2%
UK	392,577	5.9%
Colombia	372,541	5.6%
Argentina	285,602	4.3%
Germany	250,881	3.8%
France	227,971	3.4%
Bolivia	201,542	3.0%
Peru	197,374	3.0%

Note: Data from the National Statistics Institute.

The EGM also uses different languages for interviews, but only the official languages of Spain: Spanish, Catalan, Basque, and Galician. English is also permitted, but in the form of a self-administered questionnaire rather than for the purposes of a face-to-face interview. Although there are no official figures for nonresponse rates due to language problems, a comparison of foreigners in the EGM study and in the INE data discloses significant differences and the reason may be linguistic misunderstanding, as we endeavor to explain in the following figures.

In 2010, the EGM registered about 3.4 million foreigners, but the official INE figure was over 5.7 million. The percentage of foreigners in the total EGM population was 8.5%, instead of the 12.2% recorded in the official data for the same year (see Figure 3). If we analyze previous years, we see that this survey has been interviewing a similar number of foreigners since 2005, not increasing the number of interviews in line with the rise in the immigrant population.

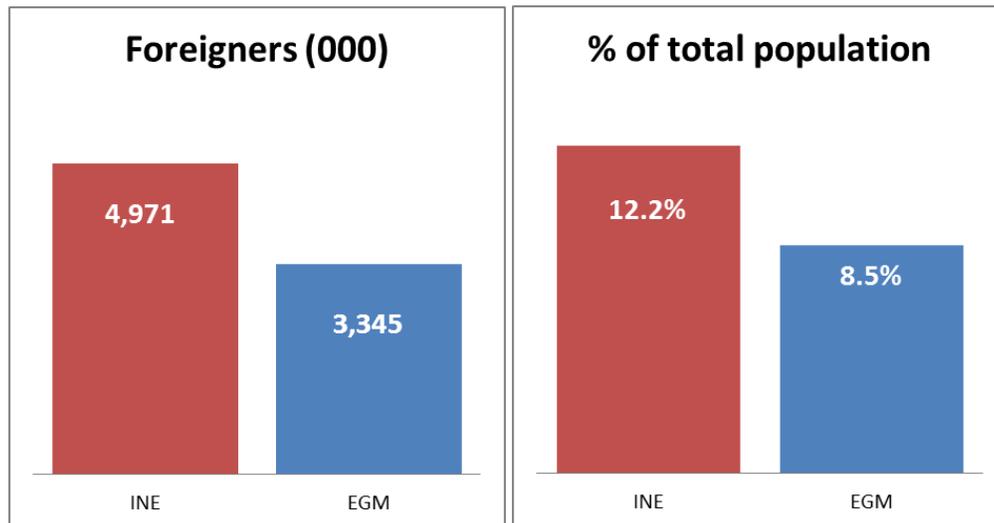


Figure 3. Number of foreigners in thousands of people (000) and percentage of foreigners according to the INE and the EGM population data.

Note: INE data based on the "Avance del Padrón a 1 de enero de 2011." EGM data obtained with TomMicro software and EGM data from February–November 2010. Population and foreigners are 14 years old and over.

The disparity between the official and EGM figures is significant in relation to non-Spanish-speaking nationalities. The top 10 Latin American countries according to the INE – all of them Spanish-speaking countries – are overrepresented in the EGM (see Table 2). But the most important countries in the official figures, Romania and Morocco, are underrepresented. Other countries in the official top 10 list such as France, the UK, and Germany are also poorly represented in the EGM. None of these

underrepresented foreigners speak Spanish in their countries. These figures suggest that the lack of foreign language use in the EGM survey precludes the participation of some immigrant groups in the sample, and leads to an overrepresentation of immigrants whose mother tongue is Spanish. Therefore, the representation of non-Spanish-speaking immigrants could be fostered by the inclusion of Romanian, Arabic, English, French, and German as survey languages.

Table 2. Percentage of Foreigners by Nationality in Each Study (Spain).

Nationality	INE data	EGM data	% difference EGM – INE
Romania	12.2%	11.9%	-2.0%
Morocco	11.5%	7.7%	-33.3%
Ecuador	7.2%	14.4%	99.8%
UK	5.9%	1.2%	-79.4%
Colombia	5.6%	10.2%	82.8%
Argentina	4.3%	5.0%	16.9%
Germany	3.8%	1.0%	-73.9%
France	3.4%	1.8%	-46.8%
Bolivia	3.0%	6.3%	108.4%
Peru	3.0%	4.3%	45.6%

Note: "% difference EGM – INE" is the rates of change of EGM percentages with respect to INE percentages. Data comes from the INE "Avance del Padrón a 1 de enero de 2011" and the EGM (data obtained with TomMicro software and EGM data from February–November 2010).

Another reason some immigrant groups may be underrepresented in the sample is the issue of irregular status, which may prompt a refusal to participate in surveys. The EGM recognizes that it is difficult to reach immigrants in irregular situations, and that is one of the problems when interviewing immigrants (Camarota, 2003; Huertas, 2005). However, several European nationalities are underrepresented in this survey. These European groups are citizens of EU member states, so their status in Spain is legal. Therefore, they are not underrepresented due to irregular status. Thus, the reason could be the lack of questionnaires in other languages.

As noted above, if more languages were included, the proportion of each nationality in the survey would align more closely with the actual proportion of each nationality in the immigrant population as a whole (in accordance with the official figures). Nevertheless, despite registering lower numbers of foreigners and underrepresenting certain immigrant groups, the scope of the EGM survey means that the

sample sizes even for underrepresented groups are still significant. For example, in 2010, the annual sample size for multimedia data was 30,526 cases. Even if a subsample of participants of a particular nationality represented only 1% of the EGM sample (as is the case with German-origin immigrants), that 1% still represents a fairly large subsample size (i.e. 305 cases). This number of people would involve a margin of error of $\pm 6.7\%$ at 95.5% confidence level and $p=q=50\%$,⁸ which are acceptable conditions for many surveys.⁹ Therefore, the EGM provides enough data for the main national groups. In other words, advertisers may base their media planning decisions in relation to some foreign target audiences on the EGM figures.

But while the EGM survey works with enough data about many foreign groups, advertisers should be aware that the proportion of some groups does not mirror their representation in the population as a whole. In addition, they should take into account the fact that those interviewed for the survey have a level of Spanish (or another of Spain's official languages) that enables them to respond to questionnaire items. Such competence in Spanish (or another official language) may correlate with different media consumption habits and advertisers must assess the extent to which this knowledge constitutes an advantage or disadvantage in publicizing their products and/or services.

Analysis of Media Consumption Data

As stated above, in immigrant audience research, ethnic media can play an important role. However, the EGM does not include all media outlets and does not provide data on ethnic media or foreign editions of newspapers and magazines. Ethnic media do not tend to have large audiences in Spain, which may explain why they are not included in the EGM study. For example, many ethnically targeted publications are produced by immigrant associations or NGOs and their distribution is limited to members and specific addressees (Gaya, 2002). Data from Soriano (2010) for Latinos in Catalonia also show low audience figures. When their audiences reach more significant levels, and/or they are broadcast or published with the required frequency for the EGM's purposes, they may apply for membership in the AIMC.¹⁰

In terms of data analysis, the EGM data allow for analysis on a nationality-by-nationality basis, as has been highlighted before. But sociodemographic differences also have to be considered.

⁸ Margin of error is obtained using the AIMC calculator at www.aimc.es, for a universe of 394,000 people, 305 cases in the sample and an estimated percentage of 50% (case of maximum disparity), for which the margin of error reaches the maximum level (any other percentage will have a smaller margin of error).

⁹ "Often, an 'acceptable' margin of error used by survey researchers falls between 4% and 8% at the 95% confidence level." See "What Every Researcher Should Know About Statistical Significance (October 2008)," retrieved from <http://www.surveystar.com/startips/oct2008.pdf>.

¹⁰ The joint industry committee structure of the AIMC can facilitate the involvement of media at a reasonable cost. If ethnic media expect higher revenues thanks to EGM audience data, they could pay to join the association and access its data.

First of all, although analyzing immigrants as a unique group is not recommended because they come from different countries, speak different languages and have different needs, it is interesting to note that immigrants and the Spanish population have markedly different sociodemographic profiles. The population of foreigners tends to be younger than the Spanish national average (see Figure 4), both in the census figures (INE) and in the EGM data.¹¹ Differences in sociodemographic factors may account for different media consumption patterns between Spanish people and immigrants.¹²

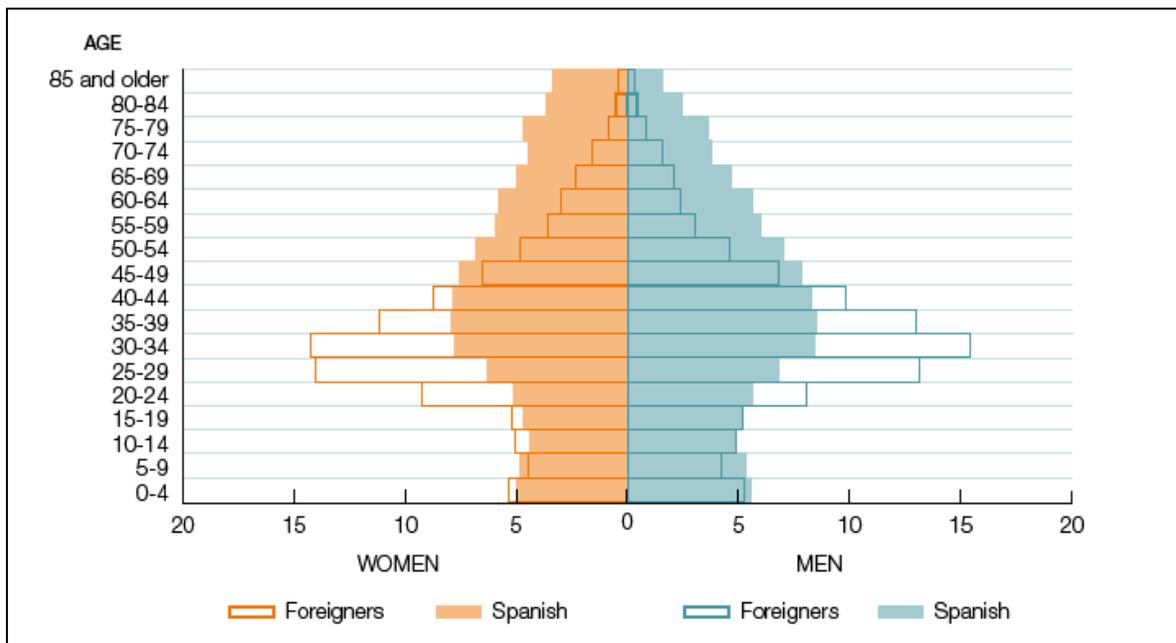


Figure 4. Comparison of population pyramids for the people residing in Spain, by nationality, sex, and age (January 1, 2010).

Note: Data from the INE.

¹¹ Immigrants tend to be younger than the host population in many countries. See, for example, Kröhnert et al. (2008).

¹² For example, foreigners as a group have greater access to the Internet than Spanish people. However, an age-controlled comparison of foreigners and Spanish people shows that Internet use among immigrants is lower than among Spanish people in the same age group. In other words, greater Internet use among immigrants is due to the fact that they are younger, not to the fact that they are foreign. When corresponding age groups are compared with one another, Internet use among immigrants is more or less equivalent to such use among Spanish people (Portilla & Medina, 2011).

However, as stated above, "foreigners" as a unique group do not usually comprise a target for media analysis, nor a target for advertising purposes. Studies of immigrant audiences have defined such groups in terms of nationality or language spoken (Huertas, 2009; Lee & Tse, 1994; Shoemaker et al., 1985; Shumow, 2010). To exemplify the line of argument in this paper, three significant immigrant groups in Spain are compared: Romanians, Moroccans, and Latin Americans from Spanish-speaking countries.

First of all, these three groups have different sociodemographic characteristics. Almost two-thirds of the Moroccans in Spain are men. In contrast, there are more women in the Latin American group. Romanians and Moroccans are slightly younger than Latin Americans.

These groups also show different media consumption habits related to their demographic characteristics and their knowledge of the Spanish language. The Latin American Spanish-speaking audiences are the highest readers of newspapers and magazines (32.86% and 54.26%, at least six points higher than the other two groups of foreigners). The reason could be greater competence in reading comprehension.

Television commands the highest audiences among all media and for all groups, but Latin Americans in Spain reach higher percentages than the rest, especially for national television outlets (71.79% of Latin Americans watch national TV, but among Romanians and Moroccans the figure is under 65%). This could be due to knowledge of the language, but also to gender and age, because women and older age groups tend to comprise the average television audience profile and Latin Americans are older and the percentage of women is higher than in the other two groups.

Cinema is also important for Latin Americans and again the reason may be related to language. However, the percentage of Internet users is higher among Romanians than in the other two groups. The reasons could be age and level of education, two characteristics related to Internet use. Romanians are younger than Latin Americans and have a higher education level than Moroccans, which may account for their greater use of the Internet.

These examples show that each immigrant group in Spain, defined by nationality, exhibits different media consumption behaviors with respect to one another and to the Spanish population in general. However, such differences are not due solely to nationality. Specific sociodemographic factors and levels of linguistic competence may have a bearing on such consumption. Therefore, as the EGM study shows, both pieces of data (Spanish-language competence and group-specific sociodemographic characteristics) ought to be taken into consideration as part of any analysis of media consumption by immigrant groups.

Conclusions

In countries where immigration is a relatively recent and increasingly significant phenomenon, as in the case of Spain, there would appear to be good commercial reasons for studying immigrant populations as media audiences. Industry stakeholders require a reliable source of data for the purposes

of decision-making. Thus, if immigrants are to be included among their potential target audiences, accurate information on such groups is also required.

A clear definition of what an immigrant is and the use of a suitable data collection methodology are the keys to devising an effective immigrant audience measurement strategy. In addition, the information collected should be analyzed according to the sociodemographic differences of the various groups of immigrants.

Nationality is an easily documented and internationally recognized marker for the definition of *immigrant*. Such data is especially significant in Spain because the numbers of immigrants and foreigners are considered equivalent in the official figures. Foreigners register in the "Padrón" to gain access to free medical care and the public education system, which enables an up-to-date account of the numbers – and any changes to the numbers – involved.

The significance of nationality in defining immigrants is disclosed in studies of Spanish audiences, which have included this factor since 2002. However, two further pieces of data have been shown to play an important part in the measurement of immigrant audiences: the length of time spent living in the country, and being a child of immigrant parents. This information is not encompassed in Spanish media audience studies, perhaps because it tends to be difficult to establish. However, in addition to nationality, studies of immigrant audiences ought to include both these pieces of data.

In studies of immigrant populations in countries with a longer history and broader experience with immigration, the face-to-face interview is known to be the most advisable survey methodology. If telephone surveys are carried out, they should be complemented by such personal interviews. The Spanish case suggests that it is important to find out about access to fixed-line and mobile telephones among immigrants. Many immigrants in Spain have only a mobile telephone; therefore, a combined methodology (telephone survey and face-to-face interview) would require the use of mobile telephones.

The need to include languages used by the main immigrant groups in the host country for the purposes of the survey has also been noted. Failure to do so may lead to a higher nonresponse rate, as evidenced in previous studies in the field. What is more, in the case of Spain – where only official languages of the country are taken into account – the number of Spanish-speaking immigrants is out of all proportion with other national groups. That is to say, most foreigners registered in Spanish audience surveys are themselves Spanish speakers, a phenomenon that does not mirror the social reality of the immigrant population as recorded in the official figures.

For a better representation of the immigrants' media consumption, a multilingual survey is needed. If the questionnaire is in the language of the host country, only those who have a certain level of linguistic competence in that language may respond to the survey. If advertisers and media planners need to reach people with lower levels of Spanish language proficiency, more languages should be included, despite the fact that doing so is likely to increase the cost of the necessary fieldwork.

As for data analysis, previous studies have highlighted the need to analyze ethnic media and immigrant subgroups in terms of nationality. In countries where immigration is a relatively recent phenomenon, such as Spain, ethnic media may not have enough impact to warrant inclusion in industry analyses. However, this may change in time as these ethnic media develop further. A joint industry committee structure such as the Spanish EGM facilitates data access to ethnic media at lower cost than other media research companies with commercial interests.

Moreover, the need to include national background and spoken language(s) is also validated in the case of Spain. In fact, the EGM case shows that immigrant groups are different from one another as well as from the rest of the Spanish population because of sociodemographic factors, not only because of differences in nationality. Such factors may explain why media consumption patterns for a given nationality are different than other national groups and/or the consumer behaviors of the host country in general. At this point, future research should aim to address which consumption patterns are really different according to nationality or to sociodemographic characteristics.

In any case, our view is that the EGM in Spain provides reliable data on the immigrant audience due to the size of the sample, although it could be further refined by including such data as the length of time living in the country and whether or not an individual is a second-generation immigrant. Both aspects have been proven to be relevant to immigrant audience analysis in countries with a longer history and experience of immigration. This information could also be useful in applying immigrant audience measurement strategies in other countries and in the decision-making processes undertaken by media outlets and advertisers whose goal is to target immigrant markets.

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