

2009
HISPANIC
CONSUMER SURVEY
ON SAP

PERFORMED FOR THE:
SCREEN ACTORS
GUILD



COMPLETED: AUGUST 2009
LATINO PRINT NETWORK'S
Western Publication Research

The Leader In Hispanic Readership Studies Since 1978

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SAP AWARENESS & ACCEPTANCE

1. Have you ever watched an English language TV program and listened to the audio in Spanish via SAP?

80.4% Yes 19.6% No

The number that have used SAP is far higher than initially thought

2. The most recent time you watched a TV program using SAP was:

59% Within the past week
15% Within the past month
13% Longer than a month
12% Longer than a year

The percentage that used SAP in the PAST WEEK shows the overall acceptance of the service

3. Would you watch more SAP enhanced programs if they were easier to find?

88% Yes 12% No

SAP users want SAP to be EASIER

4. How does watching a SAP TV program improve your TV watching experience? (please check 3)

51% I can watch more shows that I want to watch
69% I can better understand the story and what is being said
48% I'm able to watch shows I won't be able to normally watch
11% I find that I watch more TV
19% My family watches more TV together
28% My children are improving their Spanish
20% More members of my family can enjoy the show
38% Some members of my family do not speak English

5. Do you know which programs are currently available in Spanish through SAP?

56% Yes 44% No

SAP audiences will increase as SAP becomes easier to use

13. Do you find that you are watching an individual show more often if it is in SAP?

82% Yes 18% No

SAP is definitely an audience builder

20. Now that you have a better understanding of Disponible Español, what 3 things best describe your feelings about SAP? (please check 3)

70% It sounds like a great service
64% If more English language TV shows offered it, I'd watch more English language TV
50% I look forward to telling my family and friends about these services
58% I wish this service was on all English language TV programs
9% I don't think I'd use these services because I understand English fairly well
0% I don't think I'd use these services because they might be too hard to operate

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TYPES OF SHOWS WATCHED VIA SAP

6. What types shows have you and/or family members watched using SAP? (please check 3)

- 53% News
- 32% Sports programs
- 85% Movies
- 47% Cartoons
- 38% Comedy programs
- 29% Drama programs
- 14% Soap operas

19. This past month how many English language movies did you watch with Spanish audio on your TV or via a DVD? (please check one)

- 45% 1 to 4 movies
- 25% 5 to 8 movies
- 8% 9 to 12 movies
- 3% 13 to 18 movies
- 7% More than 18 movies
- 12% None

7. In the past 3 months which of the following programs have you watched using

Network Show, Prime Time

- 22% CSI: Miami
- 14% CSI: NY
- 16% Dancing with the Stars
- 16% Desperate Housewives
- 12% Grey's Anatomy
- 10% Lost
- 5% Private Practice
- 35% Simpsons
- 23% Ugly Betty

Network Show, Other

- 2% The Bold and the Beautiful

Syndicated Shows

- 26% Cops
- 17% Oprah

Premium Cable

- 15% Premium channel programming like:
- 30% In Treatment
- 16% Real Sports with Bryant Gumbel
- 8% Summer Heights High

Cartoons

- 31% Cartoon programs like the following:
- 9% 3-2-1 Penguins
- 5% Babar
- 17% Batman: The Animated Series
- 12% Clifford the Big Red Dog
- 5% Cyberchase
- 15% Dragon Tales
- 17% Fantastic Four
- 6% Gargoyles
- 16% Lilo & Stitch: the series
- 19% Maya & Miguel
- 13% Pinky & the Brain
- 6% Recess
- 4% Silver Surfer
- 13% Superman: The Animated Series
- 2% The Avengers: United We Stand

While movies are VERY popular, individual TV shows also are popular with SAP users

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How Do VIEWERS LEARN ABOUT SAP?

8. How did you find out that there was the option of watching programming dubbed into Spanish thru SAP?

- 32% A friend/family member showed me
- 57% Through coding at the start of a TV program
- 24% Through an advertising campaign on TV
- 8% Through an article in a newspaper or magazine
- 15% I don't remember

Most are introduced to SAP via the trial and error process of experimentation

21. When the Oprah show began offering the Spanish version in October of 2008, did you see any of the promotions that Oprah was in SAP?

- 24% Yes
- 76% No

22. Which of the following statements do you feel applies to English language TV networks that offer programming in Spanish? (check as many as apply)

- 48% They want to have a larger audience for their programs
- 77% They recognize the importance of the Hispanic community
- 38% This is a smart move
- 56% More people will watch their programs
- 38% I wish all TV networks offered SAP programs

The viewers clearly see this service as one that is important to Spanish Dominate & Spanish preferred audiences

23. Have you seen any type of advertising or articles on programs dubbed into Spanish that are broadcast thru SAP? (check as many as apply)

- 33% Saw ads about SAP on English language TV
- 28% Saw ads about SAP on Spanish language TV
- 21% Saw articles or ads about SAP in TV guides
- 12% Saw articles or ads about SAP in newspapers
- 10% Saw articles or ads about SAP in magazines
- 37% Have never seen anything promoting SAP

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SAP QUALITY CONCERNS

9. Have you noticed variations in the quality of the Spanish offered via SAP?

68% Yes

32% No

This is key to keeping SAP listeners coming back for more shows

11. Which of the following concerns have you had with SAP?

51% The Spanish does not seem to be translated very well

47% The Spanish audio lacks the emotional involvement that the original show offers

25% The Spanish audio is not of the quality I'm used to

12% My cable/satellite company does not provide the signal

28% The SAP signal works sometimes, but not always

17. Have you ever watched an English language TV program and viewed subtitles in Spanish?

88% Yes

12% No

This key number shows there is tremendous potential for SAP expansion

18. How would you rather watch English language movies? (please check one)

37% Dubbed into Spanish

55% English with Spanish subtitles

8% In English with no subtitles

IF NOT USING SAP

This percentage of those interviewed have not used SAP:

20%

14. Would you like to watch English language TV programs dubbed into Spanish?

85% Yes

15% No

This number also shows there is tremendous potential for SAP expansion

15. Are you aware of SAP offerings?

45% Yes

55% No

16. Do you prefer to watch English language programs in English rather than dubbed into Spanish?

42% Yes

58% No

Most non-SAP users would like an SAP like service rather than English

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RESPONDENT DEMOGRAPHICS PART 1

PERSONAL CHARACTERISTICS

A. What is your sex?

53% Female

47% Male

B. Were you born in the U.S.?

12% Yes

88% No

C. Which of the following best describes your ethnic heritage? (check one)

61% Mexican/Chicano

8% Puerto Rican

9% Central American

4% Cuban

4% Dominican

11% South American

4% Other Hispanic/Latino

0% White, non-Hispanic

0% Other non-Hispanic

D. In what year were you born?

1968 Average

**Average Age of
Respondent**

40

E. Respondent by age group:

16% Under 30

84% 18-49

68% 30-49

16% 50 or over

F. Marital status? (check one)

54% Married 15% Divorced

30% Single 0% Widowed

HOUSEHOLD CHARACTERISTICS

A. How many people live in your household, including yourself?

4.1 Average

B. How many children do you have?

0.4 Under 3

0.6 3-11

0.6 12-17

**Average
Number of
Children
1.5**

C. Percentage of household under 18:

37%

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RESPONDENT DEMOGRAPHICS

PART 2

EDUCATION

- A. What is the highest grade in school that you have completed? (ie: if the Eighth grade, then 8; if two years of college, then 14)

12.6 Average

CITIZENSHIP

- A. Are you a U.S. citizen?

49% Yes

51% No

- B. Were you born in or outside the USA? (check one)

88% I was born in another country

4% I was born in the USA,
but not my parents

6% I was born in the USA, as was at
least one of my parents.

1% I don't know

- C. What year did you permanently move to the United States?

1995

Avg. Yrs. in U.S.	Avg. % of Life in U.S.
<u>13</u>	<u>32%</u>

INCOME

- A. What was your approximate total household income? (check one)

38% Less than \$25,000

26% \$25,000-\$34,999

18% \$35,000-\$49,999

11% \$50,000-\$74,999

6% \$75,000-\$99,999

1% \$100,000 or more

Avg. Annual Income
\$39,053

% Earning Over \$50,000
17%

- B. Percent of annual income spent on:

30.5% Mortgage or rent payments

18.0% Food at home

5.4% Food away from home

4.1% Medical

4.0% Phone

5.2% Travel

2.9% Money to family in Latin
America

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LANGUAGE & MEDIA PREFERENCES

A. How well do you:

	<u>Very Well</u>	<u>Well</u>	<u>Not Well</u>	<u>Not At All</u>
a. Speak Spanish	91%	5%	3%	0%
b. Speak English	19%	28%	52%	1%
c. Read Spanish	92%	6%	2%	0%
d. Read English	28%	33%	36%	3%

Well & Very Well for The Following

a. Speak Spanish	97%	b. Speak English	47%
c. Read Spanish	98%	d. Read English	61%

B. What language do you usually speak at home?

19%	Only Spanish
46%	Mostly Spanish
31%	Both equally
0%	Mostly English
0%	Only English

C. What is your preferred language for reading?

64%	Spanish
3%	English
33%	Both

A. How many people read your copy of this publication?

4.2 Average

B. What the average age of ALL the readers of this publication?

37.4

E. In the past week, how many hours did you spend using the following? (check as many as apply)

IN SPANISH

Hours Per Week	<u>1-4</u>	<u>5-9</u>	<u>10+</u>	<u>0</u>	<u>Avg. Hrs.</u>
Newspapers	87%	9%	2%	2%	3.3
Magazines	74%	9%	2%	13%	3.1
Internet	54%	24%	20%	2%	10.1
Radio	51%	25%	9%	13%	5.5
Television	49%	23%	24%	3%	11.6

IN ENGLISH

Hours Per Week	<u>1-4</u>	<u>5-9</u>	<u>10+</u>	<u>0</u>	<u>Avg. Hrs.</u>
Newspapers	72%	9%	0%	17%	2.5
Magazines	68%	9%	0%	22%	2.4
Internet	52%	25%	16%	6%	8.6
Radio	60%	10%	9%	19%	4.4
Television	58%	24%	15%	2%	8.7

J. In terms of local news, this publication is your?

42%	Best source of information
57%	Good source of information
1%	Prefer other sources

Readers Feel Publication Is Best or Good Source For Local News

99%

E. How would you rate this publication in terms of your local activities and shopping decisions (check one)?

42%	Best source of information
57%	Good source of information
1%	Prefer other sources

Readers Feel Publication Is Best or Good Source For Shopping Info

99%

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INTERNET, MOVIE & CABLE USAGE

INTERNET USAGE

A. This year, do you plan to purchase a home computer?

48% Yes

B. Does your household have:

22% Dial up Internet service like AOL

77% High speed Internet DSL or Cable

C. Hours on the Internet this past week (by language):

10.1 Spanish

8.6 English

18.7 Total hours

D. Which types of sites have you visited on the internet in the past month? (check all that apply)

71% Latin American sites

76% U.S. sites in Spanish

42% This publication's web site

58% U.S. sites in English

1% Haven't been on the internet

**Average Types of
Sites For Those
Using Internet
2.5**

MOVIES VIEWED

A. Last month, how many movies in a theater did you see:

0.9 a. In English

0.3 b. In Spanish

HAVING CABLE OR SATILITE TV

B. Does your household have:

48% Cable TV

24% Satilite TV

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RESEARCH METHODOLOGY

RESEARCH METHODOLOGY FOR THE SAP USAGE STUDY

There were two parts to this study. The first was a survey of a select group of readers of Hispanic publications that had responded within the past nine months to The 2009 National Hispanic Readership Study. The second was a survey of readers of Tele Guía de Chicago, a Spanish language TV guide. This is a target audience study and not a market study. **The prime audience was Spanish Dominate and Spanish Preferred readers of Spanish language newspapers and magazines.** 57% of the Hispanic households in the USA use one or more Hispanic publications on a weekly basis. The questionnaires were done bilingually, with Spanish as the lead language. **633 people were surveyed overall during this project.**

For the first survey, we reached out to a select group of respondents to The 2009 National Hispanic Readership Study. As of June 2009 the National Hispanic Readership Study includes 8,635 respondents from 39 publications in 17 markets from around the USA. The National Hispanic Readership Study was based upon a random sample of the participating publication's readers. 71% of these respondents had the internet within their home and another 8% access the internet weekly outside the home. For the SAP Usage Study we only looked at a portion of those surveyed that we had an e-mail address for. **448 people were surveyed for this segment.** For those responding to the this survey we were able to match their response to the SAP Usage Study with their responses from the original National Hispanic Readership Study to give us greater language and demographic details.

The second was a survey of readers of Tele Guía de Chicago, a Spanish language TV guide. This publication was chosen because it covers television in Spanish for Spanish dominate Latinos. The publication ran an advertisement for several weeks requesting that readers go online and complete a survey similar to the first survey listed above. **185 people were surveyed for this segment.**

The responses to both survey differed very little: 80.6% of the first survey and 80.0% of the second had used SAP. The Tele Guía audience were more likely to have used the service within the past week (67%) vs the national sample (56%).

The incentive for readers to respond to either of these surveys was that between the two surveys one of the respondents will receive \$1,000.

The confidence level with the final data is between 95% and 97% (the margin of error is 3% to 5%).

Lead Researcher: Kirk Whisler
Research Assistants: Abraham Larrando & Melanie Slone

Total qualified surveys

633