

THE Advertising Age
Encyclopedia of
Advertising

VOLUME 3

P-Z

Editors

JOHN McDONOUGH AND THE MUSEUM OF
BROADCAST COMMUNICATIONS

KAREN EGOLF, ADVERTISING AGE

Illustration Editor

JACQUELINE V. REID

HARTMAN CENTER FOR SALES, ADVERTISING, AND
MARKETING HISTORY OF DUKE UNIVERSITY

FITZROY DEARBORN
An Imprint of the Taylor & Francis Group
New York • London

Published in 2003 by
Fitzroy Dearborn
An imprint of the Taylor and Francis Group
29 West 35th Street
New York, NY 10001

Published in Great Britain by
Fitzroy Dearborn
An imprint of the Taylor and Francis Group
11 New Fetter Lane
London EC4P 4EE

Copyright © 2003 by Taylor & Francis Books, Inc.
Fitzroy Dearborn is an imprint of the Taylor & Francis Group.

All rights reserved. No part of this book may be reprinted or reproduced or utilized in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying and recording, or in any information storage and retrieval system, without permission in writing from the publisher.

10 9 8 7 6 5 4 3 2 1

British Library and Library of Congress Cataloguing-in-Publication Data are available.

ISBN 1-57958-172-2

First published in the USA and UK 2003

Typeset by Andrea Rosenberg
Printed by Edwards Brothers, Ann Arbor, Michigan
Cover design by Peter Aristedes, Chicago Advertising and Design, Chicago, Illinois

Front cover illustrations: *Pepperidge Farm Goldfish*, courtesy of Campbell Soup Company. *Reggie!* candy bar. *Packard Motor Car Company*, used with permission of Studebaker National Museum Archives. *Carbolic Smoke Ball*. *Close-Up Toothpaste*; the CLOSE-UP print ad was reproduced courtesy of Chesebrough-Pond's USA Co. *Truth* antismoking campaign, courtesy of the American Legacy Foundation. *Absolut Vodka* (Absolut Warhol), under permission by V&S Vin & Sprit AB, Absolut Country of Sweden Vodka & Logo; Absolut, Absolut Bottle Design and Absolut Calligraphy are trademarks owned by V&S Vin & Sprit AB, © 2001 V&S Vin & Sprit AB. *Tio Pepe*, courtesy of Gonzalez Byass. *Chocolates Matias López*.

Back cover illustrations: WOOK radio station, Washington, D.C. *Corn Nuts*, courtesy of Kraft Foods Holdings, Inc. *Wheaties*, courtesy of Michelle Akers and the General Mills Archives. *Rock the Vote*, courtesy of Rock the Vote Education Fund. *Dial Soap*, courtesy of the Dial Corporation. *War Production Board*. *Harness' Electropathic Belt*.

Korean advertising and broadcasting industries. Television ratings services are provided by Media Service Korea (owned by AC Nielsen) and Taylor Nelson Sofres, which started its operation in October 1999. The Korea Audit Bureau of Circulations was established in May 1989 to collect statistics on newspaper and magazine circulation. The system was not yet fully established at the turn of the century, but figures were beginning to be available for some of the major newspapers and magazines.

YOUNG SOOK MOON

Further Reading

- Advertising Yearbook*, Seoul, Korea: Korea Association of Advertising Agencies, 1998
 Chang, Won Ho, Teddy Spha Palasthira, and Hung Kyu Kim, *The Rise of Asian Advertising*, Seoul: Nanam Publishing House, 1995
 Koranteng, Juliana, "Top Ten Global Markets," *Advertising Age International* (May 1999)
 Shin, In Sup, *Advertising in Korea*, Seoul: Shisa Yong-O-Sa, 1989

Spain

The earliest Spanish advertising appeared in the country's newspapers. On 6 April 1825 the *Diario de Avisos* began printing a few advertisements in its daily edition. The newspaper *La Esperanza* (1843–73) had a long life precisely because of its advertising, even though its editorial content was heavily ideological and political, as was the norm in most dailies at that time. The first genuinely commercial newspaper was *La Correspondencia de España*, based on the French model originated by Emile Girardin and introduced into Spain by Manuel María de Santa Ana. As advertising started to become a profitable business, María de Santa Ana founded the Sociedad General de Anuncios de España (SGAE; General Society for Spanish Advertising), the first true Spanish advertising agency. The fourth page of *Correspondencia de España* was sold to SGAE and dedicated entirely to advertising. Other agencies, such as Empresa y Comisión Central de Anuncios and Publicidad-Empresa de Anuncios, were soon established. For the most part, their business involved selling advertising space in newspapers.

The pioneer advertising agencies were subsidiaries of newspapers or other businesses. In 1857 Roldós, named after its founder Ruperto Roldós, was formed. The agency initially worked for newspapers, but it soon started editing brochures and creating some outdoor advertising, such as posted signs. Roldós operated independently through 1929, when it merged with businesses in Madrid and Barcelona, becoming Roldós-Tiroleses. In 1939 it became Roldós, SA.

In the second half of the 19th century, the rates being charged by some newspapers for advertising space were out of proportion to their circulation. In 1880 the Gremio de Anunciantes (Assembly of Advertisers) was established to audit newspaper circulation. The Liga de Prensa (Press League) was founded with the same purpose slightly later. Valeriano Pérez, founder of the agency Los Tiroleses in 1891, was probably the first creative figure in Spanish advertising. He used historic events—such as Spain's war to preserve its territory in North Africa, the Spanish-American War, the quatercentenary of Christopher Columbus's 1492 voyage, and the tricentennial of the birth of dramatist Pedro

Calderón de la Barca—as the basis for advertising campaigns. He surrounded himself with talented graphic artists and developed a virtual monopoly on outdoor advertising.

Another key figure in early Spanish advertising was Pedro Prat. In 1917 he wrote *Scientific Advertising, a New Technique*. He founded the Fama agency, soon associated with the Swiss agency Publicitas, which had been working in Barcelona since 1898. Prat went to Madrid to found Veritas in 1928 and after the Spanish Civil War (1936–39) founded Oeste (West). He later wrote *Técnica de la Publicidad* (1922) and *Publicidad Racional* (1934).

The advertising multinationals began arriving in Spain in the 1920s, among them Publicitas, Germany's Rudolf Mosse, Britain's Crawford, France's Havas, and, from the United States, the J. Walter Thompson Company (JWT). They came with multinational advertisers such as Shell, Martini, Nestlé, General Electric, Olivetti, Coca-Cola, Renault, Ford, Peugeot, Citroën, and General Motors. JWT came to Spain in 1926 with its client General Motors but left the country a few years later in the wake of the stock market crash of 1929. JWT introduced "reason-why" advertising in Spain (hard-sell advertising appealing to reason, as opposed to soft-sell advertising appealing to the emotions); its ads were different from the then-prevalent poster-art style, having more in common with the modernist aesthetic that was then dominating the Spanish art scene. Spanish advertisers also began to use testimonials. The first National Advertising Conference met in Barcelona; of the 123 participants, 94 were Catalans (i.e., from the northeastern region that includes Barcelona).

Creativity in Spanish Advertising

Art was an important element in early Spanish advertising; from the 19th century to the time of the Spanish Civil War, painters and graphic artists worked together. They used vivid color and were influenced by the Romantic type of illustrations seen in magazines of the day such as *La Moda Elegante* (a fashion magazine founded in 1841) and *La Ilustración Artística* (1889). At the end of the 19th century Catalan artists were heavily influenced by the

French Art Nouveau style. A significant change occurred when modernist and even cubist painters such as Juan Gris began contributing to the popular weekly supplement *Blanco y Negro* (founded in 1891). Cosmetics joined medical remedies as widely advertised items, and to these were soon added new products such as cameras, typewriters, and cars. Women began appearing in ads as something more than decorative figures; they now were actively consuming goods that were fashionable and earned them status. Page ads with spectacular illustrations appeared in the 1920s, and in the 1930s color lithography came into widespread use.

Innovation in the graphic arts was fostered by company-sponsored competitions. The first such contest, held in Barcelona in 1897, drew 172 submissions. Ramón Casas, a modernist painter and friend of Pablo Picasso and Santiago Rusiñol, was the winner. This contest was underwritten by Anís del Mono, a liqueur manufacturer; it was soon followed by other competitions, sponsored by the sparkling wine producer Codorniu and Amatller, a chocolatier.

The modernist style also dominated advertising in Madrid, exemplified particularly in the work of graphic artists such as Rafael Penagos and Federico Ribas. Another graphic artist of note during this period was Josep Renau, who worked in Valencia. Gal cosmetics, the brand that invested the most in advertising in the 1920s, still maintains its own advertising museum in Alcala, a city near Madrid. Its agency was Prat's Veritas. The first advertising billboard was erected by a road near Manresa, in Catalonia, on 2 May 1912.

The 1920s marked the early development of commercial radio advertising in Spain. The broadcaster Unión Radio, established in 1925, initiated an evolution from repetitive and boring messages to a more entertaining radio style. Sponsored programs were rapidly introduced. The beginnings of radio in Spain were wholly commercial; only later were government-owned stations introduced.

Stagnation

The end of the Spanish Civil War inaugurated a less creative era than the one that preceded it. The country was very poor and isolated. Advertising was basically political and served the interests of the regime of Francisco Franco. The advertising industry would not be rebuilt until the economy began to grow and function in a non-subsistence, more prosperous environment.

In the late 1940s agencies such as Oeste, Roldós, Vila, Publicitas, Valeriano Pérez & Sons, Los Tiroleses, Gisbert, and Ruescas started up again. Most advertisers were local, however, and had very small budgets. Only a handful of food, cleanser, toy, medicine, and shaving brands advertised nationally. Newspaper circulation was limited by a scarcity of paper, and the contents continued to be censored. Agencies regressed to becoming mere sellers of advertising space for newspapers. Very little radio, magazine, or outdoor work was done at this time.

After 1952 some multinational corporations such as Nestlé, Coca-Cola, and Firestone returned to the advertising scene, after having left during the Civil War. Radio became the dominant advertising medium, with the Sociedad Española de Radiodifusión (SER) network dominating the market.

Motion pictures offered a new advertising opportunity in the 1950s. Jo Linten found partners in Spain in José Luis Moro and his brother Santiago. In 1955 a commercial agreement between Movierecord and Estudios Moro was reached. Linten imported short films from Britain and short advertising movies from France. For the first time Spanish ads were entered in international contests and won awards. Within the Movierecord group, Linten founded Red for outdoor advertising. Estudios Moro won a number of international awards between 1957 and 1967.

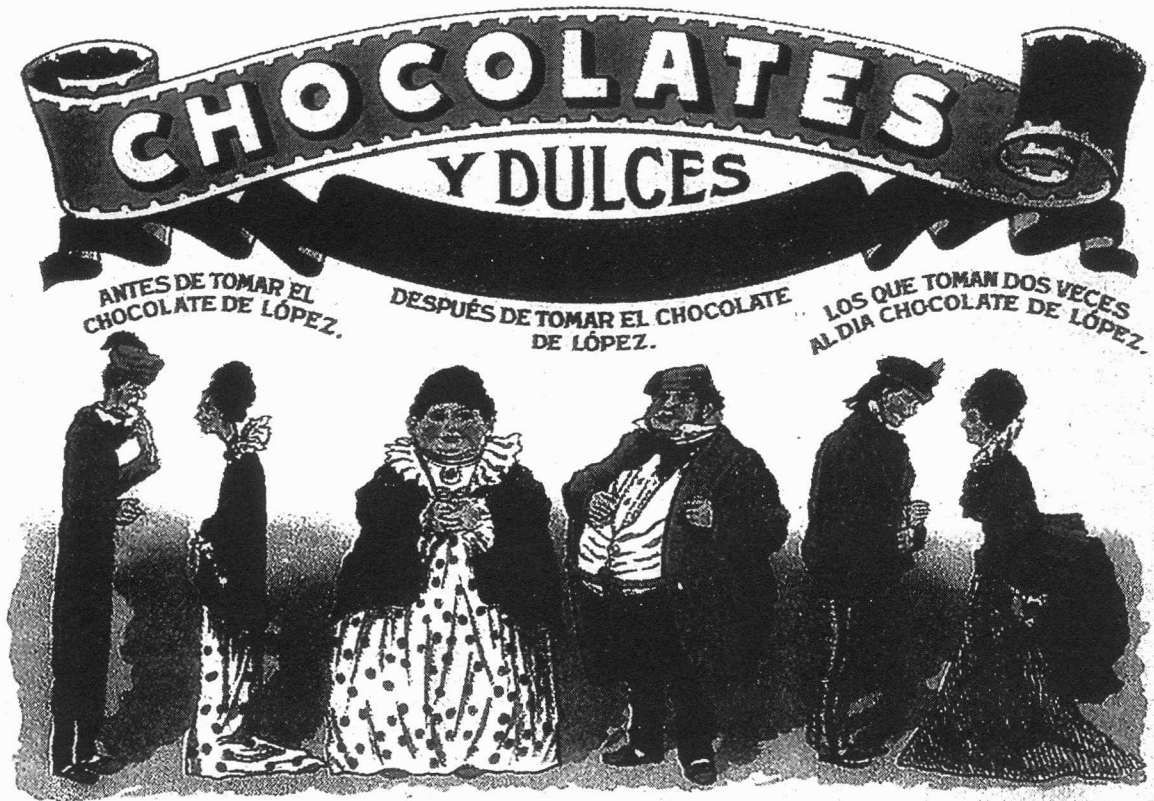
Multinationals Return

Television changed the advertising landscape. The first television station, government-owned Televisión Española, began programming on 28 October 1956. By the end of 1957, the first commercial had been broadcast. The 1960s marked an era of relative prosperity in Spain, with major industrial and economic growth. Consumer spending power increased, and new advertising markets for home technologies were opened. Tourism was becoming a major industry and offered a major new advertising opportunity. A popular ad slogan of the day was "Spain is different." In this new environment, many multinationals that had left Spain during the Civil War returned. The Swedish firm of Günther and Backab returned in 1959, attracted by tourism. Unilever brought its in-house agency, Lintas, with it to Madrid in 1958. The Leo Burnett Company (1964), Ted Bates & Company (1964), and Young & Rubicam, Inc. (1966), opened independent shops. Others formed joint ventures with local businesses: McCann-Erickson absorbed Ruescas in 1963; Grey Advertising took over Publicidad Rasgo in 1965; Arce & Potti became part of Foote, Cone & Belding in 1968. JWT was associated with Alas between 1964 and 1966 and then worked alone; one of its biggest clients was Nestlé and, in particular, the Nescafé coffee brand. These merged agencies made the finest ads produced in the post-Spanish Civil War period.

Although local shops such as Star, Colón, Cid, Danis, and Carvis continued to dominate the ad industry, Lintas, JWT, and Grey rapidly rose toward the top. JWT, led by Manuel Eléxpuru and Julián Bravo, stood out during the 1970s because of its professionalism and the talent of its personnel. Lintas, under the direction of Manuel Ramiro, was perhaps the leading agency by the beginning of the 1980s. Professionalism was also fostered by two trade magazines, *Control de Publicidad y Ventas* and *IPMark* (both started in 1962), and the Oficina de la Justificación de la Difusión, a nongovernmental auditing body. It was this organization that finally introduced clear parameters for auditing newspaper and magazine circulation. Censorship was abolished by law in 1966. In 1971 Spanish universities began offering degrees in advertising.

Resurgence and Growth

In 1974 Danis united with Benton & Bowles; TBWA opened its Spanish operation in 1975, and Tiempo joined with Batten Barton Durstine & Osborn in 1976. Also in 1976 Luis Bassat founded Bassat y Asociados, a shop in which Ogilvy & Mather



One of the first Spanish companies to advertise using posters was the confectioner Chocolates Matias López. This example dates from 1875.

participated. By the end of the Franco regime in 1975, Spanish advertising was set to enter its contemporary phase. The Spanish agency MMLB would be key in defining the national version of the creative revolution, similar to the U.S. creative revolution of the 1960s. MMLB, a creative boutique rather than a full-service agency, published a manifesto much like those issued by avant-garde artists. Other agencies soon followed suit, including Ricardo Pérez (1978), Tándem Company Guasch (1978), and RCP (1979), the latter of which counted among its ranks the creative talents Luis Casadevall and Salvador Pedreño. In 1975 multimedia audience measurement was improved by the newly formed Estudio General de Medios (EGM), the result of an industry-wide agreement among agencies, advertisers, and media. In 1977 the AEAP (Spanish Association of Advertising Agencies) gave new consistency to the industry by building a partnership between the largest agency networks in the country. In 1986 the National Cinema and Television Awards were introduced, signaling a golden age of Spanish creativity that probably reached a peak in international recognition in 1993, when Spain tied with

the two major creative countries, the United States and the United Kingdom, in the number of awards won at the Cannes (France) International Advertising Festival.

By the 1990s the Spanish advertising market was the fifth largest in Europe and the eighth largest in the world in terms of spending. In Europe, only Germany, Britain, France, and Italy spent more on advertising. Overall ad spending in Spain did not compare with that of the biggest markets, however. For example, U.S. spending was 24 times that of Spain in 2000.

Advertising expenditures in Spanish media markets have followed the larger pattern of other European Union countries. In the late 20th century the European advertising market was characterized by the growth of television, a medium that developed at a faster rate than any of its predecessors. Digital paid television, through cable or satellite, started in 1999 and promised to reinforce and perhaps accelerate the trend. Television's share of advertising spending grew from 24.4 percent in 1984 to 36.8 percent in 1997. In 1998 media share in Spain (including the Internet) was as follows: TV, 45.7 percent; newspapers, 23.4 percent; maga-

zines, 13.1 percent; radio, 10.9 percent. Advertising spending for television grew more than 90 percent from 1988 to 1993, the early period of commercial television in Spain following deregulation in 1989. During the same period, daily newspapers lost 20 percent, magazines more than 40 percent, and even radio, a powerful medium in Spain, more than 50 percent.

The Spanish market still had room for growth: worldwide it was only 16th in per capita advertising expenditures and 11th in advertising expenditures as a percentage of the gross domestic product (GDP), with 0.83 percent of GDP, well behind the 1.34 percent of GDP in the United States and the 1.23 percent of GDP in the United Kingdom.

Overall growth in ad spending was spectacular in the 1980s, when advertising expenditures were increasing an astonishing 25 percent yearly on average. This boom was followed by an advertising recession in 1992 and 1993, when there was a real decrease in spending, as advertising expenditures were growing at a lower rate than inflation (2 percent and 4 percent, respectively). In the late 1990s the market was again expanding, although more moderately than in the 1980s. By the turn of the century, overall advertising expenditures in Spain had reached approximately \$6 billion.

Every medium was different, however. Spain was, above all, a broadcasting market. Per capita advertising expenditures were low for newspapers and magazines—as was readership—compared with those of other European Union countries. The country had low levels of readership, despite audience and circulation growth for dailies in the late 1990s. Magazines were in a process of specialization that was increasing the circulation of monthly issues targeted to specific audiences; at the same time, the circulation figures and market impact of weekly publications were declining. Overall, Spain was the fourth-largest cinema advertising market in the world and the seventh-largest radio and television market. Terrestrial television (i.e., free, transmitter-broadcast television, as opposed to paid, cable, or satellite television) was still drawing huge audiences, and the influence and prestige of radio was higher than in other European markets as a result of earlier deregulation in the 1970s designed to capitalize commercially on radio's large audience. Agencies, media-buying specialists, media companies, and advertisers contributed to the costs of audience research data provided through the Spanish Audit Bureau of Circulations (OJD, established 1964) and were represented on its board. These groups also jointly funded the audience media reports supplied by the EGM and the Association for Research in Communication Media (AIMC), on whose board they were also represented. There was only one audiometer provider in Spain, the French-owned Sofres, which analyzed data from 2,500 households. The reliability and accuracy of these data were matter for debate.

Media and Markets

Even as early as 1980 advertising spending for television represented a little more than 25 percent of total ad spending; by 1999 it was 38.3 percent, thus ranking Spain third behind only Italy

and Japan in terms of the percentage so devoted. On the other hand, ad spending for daily newspapers grew slightly, showing a small upward trend from 28.7 percent of total ad spending to 31.3 percent in 1997, far behind the 48.2 percent of Germany and the 43.5 percent of Canada. More important, magazines declined from a 25.4 percent share in 1980 to a mere 15.3 percent in 1997, although only Japan saw an increase of the magazine advertising market during this period. Major magazine publishers included the French publisher Hachette (which published *Elle* and *Car and Driver*) and Germany's Grüner+Jahr (the publisher of *Muy Interesante*, one of Spain's leading monthlies), owned by Bertelsmann. Radio's share of spending also decreased, from 12.5 percent in 1980 to 9.7 percent in 1997. However, Spain was still the European market with the highest radio share. The outdoor advertising market also suffered, declining from 6.4 percent to 4.6 percent between 1980 and 1997.

A number of explanations have been offered for the dominance of television. The 1990s saw the development of commercial broadcast television networks and regional stations. At the turn of the 21st century, the television market in Spain consisted both of national and regional government-owned stations as well as private stations, both national and local. TVE, the most-watched station in the country, depended on the government. The 1990s were also a decade of development for cable systems. The first paid television channel started during these years.

Nontraditional advertising media such as direct marketing (either mail-order marketing or telemarketing), sales promotion, sponsorship (especially in sports programming, which is new in Spain), and the Internet, accounted for half of overall advertising expenditures in 2000. The fragmentation of the television and radio audience, along with the increased ability of TV viewers to avoid or bypass commercials, increased the use of nontraditional media.

U.S. advertising shops dominated the Spanish agency scene by the turn of the century. McCann-Erickson, Bassat Ogilvy, Tiempo BBDO, Grey, and TBWA were the five largest agencies in the country, with billings exceeding 4 billion pesetas (\$21 million). Among the top 20 Spanish ad agencies, 18 were owned by non-Spanish advertising agency networks. Besides U.S.-owned agencies, there were French-owned firms, such as Publicis and Euro RSCG, and British- (e.g., Lowe) and Italian-owned (Barro Testa) firms. Spain was not unique in this respect, however. With the exception of France, in fact, every European market was dominated by overseas networks.

In the 1990s there was heated controversy about the way agency billings and income were reported, with accusations of inflated figures circulated among agencies and widespread mistrust over the figures published by trade magazines such as *Anuncios*, *Control de Publicidad y Ventas*, and *IPMark*. The conflict eased somewhat in the late 1990s following an industry-wide agreement. Agency rankings were thenceforth based on figures audited by Arthur Andersen, Ernst & Young, PricewaterhouseCoopers, and KPMG Peat Marwick.

The Spanish advertising agency market was heavily concentrated in the creative hubs of Madrid and Barcelona, where large

national and multinational clients were based as of 2001. Local and regional agencies were understaffed and suffered from a lack of strategic knowledge, poor management, and weak local and regional audience research figures.

Because of TV's strong presence in Spain (it had a penetration level of 93 percent) and because the country's biggest advertisers had huge budgets for TV commercials, agencies were more interested in television than in any other medium. Most agencies in the Spanish market were still paid by commission, even though the prevalence of fees and other performance-related payments was slowly increasing. The many well-publicized TV advertising awards provided opportunities for agencies to increase their prestige and for brands to boost their recognition.

Following the French model, large media-buying conglomerates have been established in Spain. They are powerful intermediaries that use their influence to obtain impressive discounts in the media. They have also started to offer medium- and small-sized agencies and advertisers media-planning services and audience research. These services have become all the more necessary as the television audience has become more fragmented. The effects of the 1993 Sapin Law (Loi Sapin) in France—which tried to establish clear-cut, written discount agreements between media-buying conglomerates, advertisers, and media—were felt in Spain, and media-buying specialists encountered some mistrust in the market. Some of these companies were independents, the largest ones being Media Planning and Carat España, a worldwide buying outlet. Others, such as the Media Partnership, were formed by advertising agency buying coalitions (in the case of Media Partnership, by JWT and Ogilvy & Mather).

The largest advertisers had a significant presence in the Spanish market, where local television outlets were not very strong. In fact, the 38 largest advertisers accounted for 45 percent of overall spending, according to Infoadex, the Spanish provider of data on ad spending. El Corte Inglés, a large department store, Procter & Gamble Company (P&G), and the telecommunications company Telefonica were the largest advertisers, with annual budgets of more than 12 billion pesetas (\$63 million). Nine automotive advertisers (Renault, Volkswagen-Audi, Opel, Fiat, Peugeot, Ford, Citroën, Nissan, and Seat) were among the top 20 advertisers in the country, even though the highest-ranking was only seventh. Food and beverage advertisers also had impressive figures, with four advertisers among the top 20: Nestlé, Leche Pascual (a dairy producer), Danone (the European counterpart of Groupe Danone), and Coca-Cola. (Pepsi was not among the top 50 advertisers in Spain). P&G and Henkel (a manufacturer of household cleansers, toiletries, and chemicals) were also major advertisers.

Deregulation of the phone system and mobile phone licenses issued in the 1990s attracted advertising expenditures by Telefonica (which also owned one of the major commercial television networks) and its competitors, notably Airtel and Retevisión. The development of pay television and digital platforms such as Canal + (51 percent-owned by Canal + France and 49 percent-owned by Spanish media conglomerate PRISA), its digital brand

Canal Satellite Digital, and Via Digital, owned by Telefonica, have also contributed to the growth of the advertising market.

Government advertising is a major factor in the Spanish market with \$105 million in spending in 2000. The government has developed campaigns to promote safe driving and to inform the public about tax revenues, state treasury funds, the state lottery (17th-largest advertiser in 1996), the Euro currency, and issues such as drug abuse prevention, environmental protection, and AIDS education. Strong advertising figures have also been shown by regional governments, including those of Catalonia, Andalusia, Galicia, Valencia, and the Basque region.

In the 1990s the creativity of Spanish advertising won worldwide recognition and prestige thanks to superb performances by Spanish agencies in the major advertising awards programs, especially the Cannes festival. In 1997 Delvico Bates, Tandem DDB, SCPF, Casadevall Pedreño & PRG, Tiempo BBDO, BDDP Mancebo Kaye, and FCB Tapsa led the pack in national and international advertising awards. In 1997 Delvico took six Clio awards and four prizes in Cannes; Tandem DDB won four in New York and six Clio awards; Casadevall Pedreño & PRG also took four prizes in New York and two in Cannes; and BDDP Mancebo Kaye, two in New York and four in Cannes. *Advertising Age* estimated that in 2000, Spanish agencies overall had gross income of \$638.1 million on billings of \$5.24 billion.

FRANCISCO J. PÉREZ-LATRE

See also color plate in this volume

Further Reading

- Albarran, Alan B., and Sylvia M. Chan-Olmsted, *Global Media Economics: Commercialization, Concentration, and Integration of World Media Markets*, Ames: Iowa State University Press, 1998
- Cabello, Fernando, *El mercado de revistas en España*, Barcelona: Ariel, 1999
- Díaz Nosty, Bernardo, *Informe anual de la comunicación, 1997-1998: Estado y tendencias de los medios en España*, Spain: Grupo Z, 1998
- Guizábal, Raúl, *Historia de la Publicidad*, Madrid: Editorial Eresma y Celeste Ediciones, 1998
- García Ruescas, Francisco, *Historia de la Publicidad en España*, Madrid: Editora Nacional, 1971
- Gustafsson, Karl-Erik, and Lennart Weibull, "European Newspaper Readership: Structure and Development," *The European Journal of Communication Research* 22, no. 3, 1997
- Pérez-Latre, Francisco J., *Centrales de compra de Medios*, Pamplona: Ediciones Universidad de Navarra, 1995
- Pérez-Latre, Francisco J., *Curso de medios publicitarios*, Pamplona: Ariel, 1997
- Sánchez-Tabernero, Alfonso, *Estrategias de marketing de las empresas de televisión en España*, Pamplona: Ediciones Universidad de Navarra, 1997