

A report from the IPA Ethnic Diversity Forum with key contributions from *Guardian* economics leader writer Aditya Chakraborty, specialist researcher Jessica Mai Sims and Head of CultureCom Sanjay Shabi



Multicultural Britain 2012

BME purchasing power is now £300 billion

Half of Bangladeshis live in households with four or more people

Black British women spend six times more on hair products than their white counterparts

By 2016 half of the BME population will be under the age of 12

'Mixed race' Britons is the fastest growing ethnic category in the UK

Britain's most popular dish is the Chinese stir-fry

By 2051 England and Wales will be as diverse as London is now

One in four Pakistani men work as taxi drivers

A table of contents with seven entries, each represented by a colored bar and a page number in a triangle on the left. The entries are: Preface (01, green), Management summary (02, pink), Introduction (03, pink), Chapter one – BME Britain (04, blue), Chapter two – Marketing to ethnic minorities (19, yellow), Chapter three – The ethnic media landscape (24, cyan), and Appendices (33, purple).

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Both are co-authors of the chapters on BME Britain and marketing to ethnic minorities.

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This report sits alongside a wider IPA programme to monitor ethnic representation in the industry and to attract talent.

As the professional body for agencies, the IPA is a hub and a contact point for universities, apprenticeship providers and social mobility projects to create opportunities for both school leavers and graduates from all disciplines and backgrounds. It runs an annual summer Ad School for graduates, and a scheme called Creative Pioneers Challenge for school leavers, in addition to other ad hoc initiatives.

The IPA also actively encourages the use of its Diagonal Thinking self-assessment tool (www.diagonalthinking.co.uk) to identify people with the abilities required to succeed in advertising regardless of their social, ethnic or educational background.

In 2003, the IPA Ethnic Diversity Group published its first major collaborative work on ethnic diversity which looked at the employment, portrayal and economic value of ethnic minorities. This was followed in 2010 with an update entitled *The marketing opportunities for advertisers and agencies in multicultural Britain*.

This latest report, published in October 2012 to coincide with the release of the first 2011 ONS Census figures in July 2012, profiles black and minority ethnic (BME) Britain, the ethnic media landscape and marketing opportunities.

There are three main authors of this report.

Aditya Chakraborty is currently economics leader writer at *The Guardian*, winner of a Harold Wincott Award and a trustee of The Runnymede Trust, Britain's leading race equality thinktank.

Preface

» Britain's ethnic minorities are younger than the rest of the country, they are more urban, they are keener to buy and use new technology and their purchasing power is growing.

TEN FACTS ABOUT BRITAIN'S ETHNIC MINORITIES

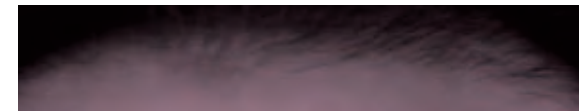
- BME purchasing power is now £300 billion (page 10).
- 'Mixed race' Britons is the fastest growing ethnic category in the UK (page 5).
- By 2016 half of the BME population will be under the age of 12 whereas half of the white population will be under 40 (page 6).
- By 2051 England and Wales will be as diverse as London is now (page 6).
- Medicine is one of the top choices of degree for many BME youngsters, especially black students (page 9).
- Nearly one-in-four Pakistani men work as taxi drivers (page 9).
- Indian households are most likely to own multiple cars or vans with 80% owning at least one (page 12).
- Half of Bangladeshis live in households with four or more people (page 14).
- Chicken tikka masala is no longer Britain's most popular dish; it is now the Chinese stir-fry (page 15).
- Black British women spend six times more on hair products than their white counterparts (page 16).

THE MYTHS THAT ARE WRONG ABOUT ETHNIC MINORITIES

- They don't spend (page 22).
- They behave the same as whites (page 22).
- They are too hard to target (page 23).

ETHNIC MEDIA OVERVIEW

- Despite turbulent economic times, ethnic media continues to grow (page 24).
- South Asians and African Caribbeans still represent the largest ethnic groups (page 24).
- The ongoing release of ONS Census data is likely to strengthen the future case for ethnic media (page 24).
- Ethnic media is evolving, maturing and splintering into different segments (page 24).
- Larger ethnic media owners and sales networks are broadening and diversifying their portfolios into multimedia (page 25).
- Eastern Europeans continue to be a prevalent audience segment (page 26).
- Cinema is rising in popularity, especially for Asians and Africans (page 26).
- Advent of highly credible digital ad networks and growing popularity of ethnic specific events (page 27).
- More media owner farmed qualitative research is being released and offsetting ongoing shortcomings in existing mainstream desktop research (page 27).
- Digital aside, a general lack of transparency and accountability with ethnic media delivery remains (page 27).



Introduction

We've been given some tantalising glimpses of the new 2011 ONS Census data. However, because there is still so much to analyse and report on, we won't know the breakouts for ethnicity until sometime early in 2013.

by Saad Saraf, Founder and CEO of Mediareach, Chairman of the IPA Ethnic Diversity Forum and member of IPA Council

Since our report two years ago, there have also been other reports on the makeup of ethnic Britain, so, as we wait for the full breakouts we feel it is worth appraising the work that has been published alongside the first figures from the Census and updating our overview of the ethnic media landscape.

There are three main chapters in this update. The first gives an overview of BME Britain, from the breakdown of different groups to the ways they spend their money. The second focuses on marketing: covering minority representation in advertising; examples of marketing successes and failures; and advice and opportunities for marketers moving forward. Finally, the third chapter offers practical guidance on how to reach different groups, including lists of current ethnic media. The key points from each are in the management summary on page 2.

We want this report to highlight what makes ethnic minority consumers tick and to make a strong case for marketers to take ethnic minority consumers more seriously. We also want to dispel some common misconceptions.

But it is not just about making the marketing case. Continuing to attract the best talent continues to be at the

top of everyone's agenda, and when we look at the penetration of the IPA online Diagonal Thinking self-assessment as an indication of future interest in our industry the results are encouraging. In 2011, nearly 28% of people who completed the online self-assessment were from multicultural backgrounds. That's nearly 1,800 people.

(www.diagonalthinking.co.uk)

These figures, alongside the chapters in this report and my own experience, make me believe that we are gradually seeing a cultural change: both in terms of recruitment and portrayal. I find this immensely encouraging, both professionally and personally.

In the meantime, the members of the IPA Ethnic Diversity Forum hope the publication of this latest report continues to provide you with the best opportunity to learn how Britain's demographics are changing, so that we, as an industry, can engage with all consumers more effectively. We hope you will read it and that it causes you to think differently about how you bring campaigns to market.



03

The figures by ethnic group have not been released at the time of writing; however data from previous years estimated that BME people were likely to make up 12 percent of the population of England and Wales and 30 percent of the population of London.² This compares to visible minorities accounting for 16 percent of Canada's population and non-white groups representing 44 percent of the United States' population.³

In 2016 the projected median age – the age that splits the population into two numerically equal groups – for BME people will be between 11 and 13 as compared to 40 for the white British population.⁴ This will result in an incredible shift in the number of minority ethnic adults in the near future. In 2051, 36 percent of the total population of England and Wales will come from a minority ethnic group.⁵ Put another way, it is just a matter of time before the rest of the country comes to be as diverse as the capital.

1 | ONS, 2012a
2 | ONS, 2011b
3 | Malenfant et al.
4 | Lievesley 2010
5 | Ibid.

The story of multi-ethnic Britain can't be split neatly into white and non-white; there is further diversity among minority groups. Indians are most likely to own their homes whereas Bangladeshis are most likely to have the biggest households. Nearly one in four black Africans send money 'home' through remittances and black (Caribbean and African) women are the most likely to put away for a private pension among minority groups. Pakistanis are most likely to be self-employed with men working in transport, while Chinese people are likely to be connected to the catering industry.

The differences between groups are what make them distinct, interesting and a worthwhile focus for attention. With a growing population, it is no wonder that their influence is seen throughout all spheres of British society including the music we listen to, the stars we admire and the food we eat in and outside the home. These groups are shaping modern Britain to be multicultural, innovative and connected to the rest of the world.

Taking the latest ONS Census data from 2011, and academic and policy research, this chapter highlights what you may not have known about BME groups and the associated opportunities in diversifying consumer markets.

MIXED-UP BRITAIN

With the first release of the 2011 ONS Census, we know that there are 56.1 million people in England and Wales – the largest population ever.¹

Britain's ethnic minorities aren't what you think. They're younger than the rest of the country, they're more urban and they're keener to buy and use new technology.

This reality was captured perfectly in Danny Boyle's Olympic opening ceremony – a mixed race family at centre stage with the young people seen playing on their game consoles, flirting over text messages and dancing in diverse groups. While some people might have been surprised to see a mixed race family used to typify Britain, 'mixing' is an everyday reality for a growing number of Britons (including, in case you'd forgotten, some Olympic gold medallists). The 'mixed' ethnic category is the most youthful and fastest growing group and people from black and minority ethnic (BME) groups are most likely to mix with people from other backgrounds in their homes, workplaces and communities.

Chapter one

BME Britain

Ten facts you didn't know about Britain's ethnic minorities

» FACT NO 1: 'MIXED RACE' BRITONS IS THE FASTEST GROWING ETHNIC CATEGORY IN THE UK



by Jessica Sims and Aditya Chakraborty



| Numbers expressed in thousands | | | | 1991 Number | Percent | 2001 Number | Percent | 2009 Number | Percent |
|--------------------------------|--------------------------------------|--|--|----------------|------------|----------------|------------|----------------|------------|
| | WHITE | | | 47876 | 94.1 | 47520.9 | 91.3 | 48188.9 | 87.9 |
| | British | | | | | 455337 | 87.5 | 45682.1 | 83.3 |
| | Irish | | | | | 641.8 | 1.2 | 574.21 | 1 |
| | Other White | | | | | 1345.3 | 2.6 | 1932.6 | 3.5 |
| | MIXED | | | | | 661 | 1.3 | 956.4 | 1.7 |
| | White and Black Caribbean | | | | | 237.4 | 0.5 | 310.6 | 0.6 |
| | White and Black African | | | | | 78.9 | 0.2 | 131.6 | 0.2 |
| | White and Asian | | | | | 189 | 0.4 | 301.6 | 0.6 |
| | Other Mixed | | | | | 155.7 | 0.3 | 242.6 | 0.4 |
| | ASIAN OR ASIAN BRITISH | | | 1689.4 | 3.3 | 2273.7 | 4.4 | 3209.5 | 5.9 |
| | Indian | | | 855.1 | 1.7 | 1036.8 | 2 | 1434.2 | 2.6 |
| | Pakistani | | | 469 | 0.9 | 714.8 | 1.4 | 1007.4 | 1.8 |
| | Bangladeshi | | | 166.6 | 0.3 | 280.8 | 0.5 | 382.2 | 0.7 |
| | Other Asian | | | 198.7 | 0.4 | 241.3 | 0.5 | 385.7 | 0.7 |
| | BLACK OR BLACK BRITISH | | | 916.9 | 1.8 | 1139.6 | 2.2 | 1540.1 | 2.8 |
| | Black Caribbean | | | 514 | 1 | 563.8 | 1.1 | 615.2 | 1.1 |
| | Black African | | | 220.1 | 0.4 | 479.7 | 0.9 | 798.8 | 1.5 |
| | Other Black | | | 182.8 | 0.4 | 96.1 | 0.2 | 126.1 | 0.2 |
| | CHINESE OR OTHER ETHNIC GROUP | | | 442.1 | 0.9 | 446.7 | 0.9 | 874.1 | 1.6 |
| | Chinese or Other Ethnic Group | | | 152.3 | 0.3 | 226.9 | 0.4 | 451.5 | 0.8 |
| | Any Other Ethnic Group | | | 289.8 | 0.6 | 219.8 | 0.4 | 422.6 | 0.8 |
| ALL ETHNIC GROUPS | | | | 50888.1 | 100 | 52041.9 | 100 | 54809.1 | 100 |

Figure 1: Population of England and Wales by ethnic group 1991-2009

Source: ONS 2011b; National Statistics 2006

» FACT NO 2: BY 2016 HALF OF THE BME POPULATION WILL BE UNDER THE AGE OF 12 WHEREAS HALF OF THE WHITE POPULATION WILL BE UNDER 40

» FACT NO 3: BY 2051 ENGLAND AND WALES WILL BE AS DIVERSE AS LONDON IS NOW

All this marks a huge change from even the very recent past. Anyone at school in the 1980s will have seen the number of non-white people double since then. You could declare your ethnic identity for the first time in the 1991 ONS Census and state if you had a mixed ethnic background by the time the 2001 Census was recorded. In reality the eighteen possible ethnic categories are the largest ethnic groups in Britain, with more than sixty smaller minority and migrant groups also making Britain their home.

Cities and regions have experienced population growth differently, explaining why it is more common to live among Pakistanis in Bradford, Chinese in Oxford and Turks in North London.⁶ The cities of London, Leeds, Sheffield, Liverpool and Cardiff hold 83 percent of all black Africans in the country.⁷ Thirty-six percent of all of England's visible minorities live in London as opposed to only 11 percent of its white population.⁸

It is worth noting that residential concentrations of minorities have produced diverse and mixed areas rather than the 'ghettos' experienced in other parts of the world.⁹ Leicester has been hyped as the first 'minority-majority' city but in reality no one ethnic group predominates there. Forty years ago Leicester took out a '[do] not come to Leicester' ad in a Ugandan newspaper to deter possible migrants. Now it actively markets its multiculturalism to potential visitors. Similarly Tower Hamlets and Newham have the highest shares of their populations belonging to a BME group (43 percent and 55 percent) of all local authorities, a fact highlighted in London's bid for the Olympics.¹⁰ We've come a long way in terms of population and attitudinal change.

⁶ | Parkinson et al. 2006

⁷ | CABE 2010.

⁸ | ONS. 2011b

⁹ | Simpson 2007

¹⁰ | ONS. 2011b

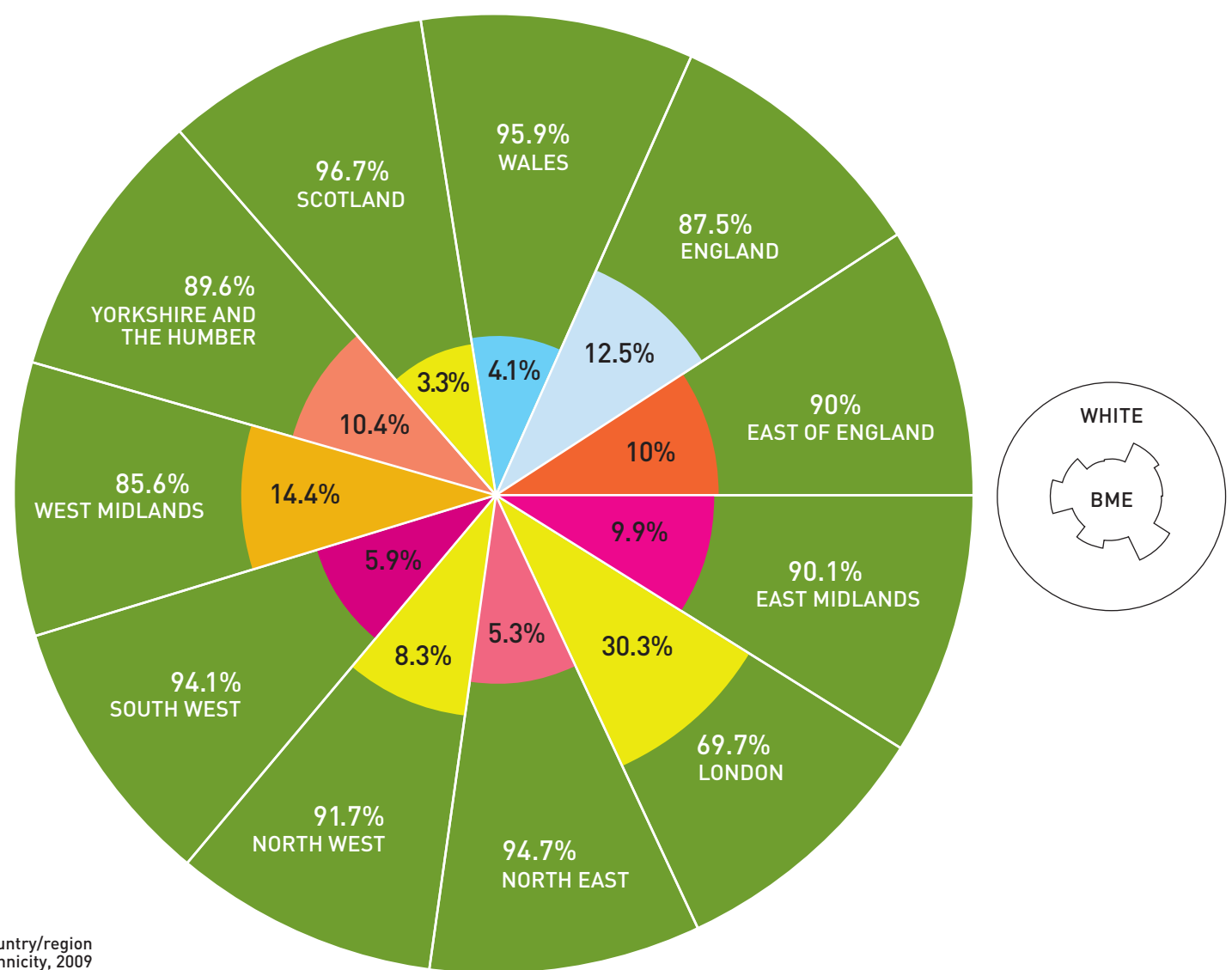
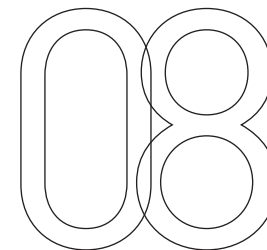


Figure 2: Proportion of country/region population by ethnicity, 2009

Sources: ONS 2011b; Northern Ireland Executive 2011; and Scottish Government



LABOUR MARKET AND EDUCATION

Educational attainment varies considerably by ethnic group, with some groups doing better than others. Asian and Chinese pupils perform higher than the national average (61.8 percent and 78.6 percent) and pupils of any black background perform lower (54.3 percent).¹¹



» FACT NO 4: CHINESE PUPILS ARE THE HIGHEST ACHIEVERS AT GCSE LEVEL

Overall BME students go on to enter higher education in good numbers, accounting for 18 percent of the total UK-domicile students.¹² These students want to go to universities with diverse student bodies while their parents want them to live close to home to reduce costs. Prestige is another consideration in choice but some people from BME groups feel they won't fit in to the Russell Group universities.¹³ Regardless of their university choice they show preferences for particular courses: black and 'other Asian' students were most likely to study subjects allied to medicine (20.5 percent and 20.9 percent) while Asian and Chinese students were most likely to study business and administration studies (19.4 percent and 20 percent). White students, on the other hand, did not

seem to cluster in any course topic. Across subject areas, the greatest proportion of BME students was in the areas of medicine and dentistry and law (32 percent and 31.2 percent).¹⁴

So while they're not going to the most selective universities in great numbers, they are choosing high-status professional careers. These course subjects also correlate to occupation clustering which suggests that these students base their choices on what is familiar and established in their social networks.

¹¹ | Department for Education 2012

¹² | ECU. 2011

¹³ | Sims 2007

¹⁴ | ECU. 2011

» FACT NO5: MEDICINE IS ONE OF THE TOP CHOICES OF DEGREE FOR MANY BME YOUNGSTERS, ESPECIALLY BLACK STUDENTS

Despite most minority ethnic people being of working age, they have an employment rate much lower than the general population (59 percent and 70 percent respectively).¹⁵ This gap widens further to 16 percent for young people (BME 36.7 percent and 53.3 percent respectively).¹⁶ All major minority ethnic groups have average lower pay than whites – even despite higher rates of educational achievement, university degrees, presence in professional fields and successful businesses.¹⁷ While white groups are spread evenly over distribution of disposable income, many other groups – notably Bangadeshis – are concentrated at the bottom.¹⁸

Similar to what we see with academic study, different ethnic groups cluster in particular jobs and sectors. While this doesn't appear to be the case for Caribbean men (transport is the highest with nearly 9 percent), 24 percent of Pakistani men are taxi drivers, 17 percent of Chinese men are chefs, 10 percent of Indian men are in Information and Communications Technology (ICT) and 9 percent of African men are security guards. These occupations match up with the likelihood of certain groups to be self-employed, particularly Pakistani men (21 percent). For women the



» FACT NO 6: NEARLY ONE IN FOUR PAKISTANI MEN WORK AS TAXI DRIVERS

clustered occupations include health and social care with 17 percent of 'other Asian' as nurses, 15 percent of Indians as doctors and nurses, and 21 percent of Africans and 13 percent of Caribbeans as care assistants and nursing auxiliaries. Clustering is less common for Chinese women; however 8 percent are employed as waitresses and kitchen assistants and 7 percent as health professionals.¹⁹

15 | ONS. 2011b

16 | ONS. 2012b

17 | Metcalf 2009

18 | Hugh 2010

19 | Smeaton et al. 2010

» BME purchasing power is growing with their combined disposable income reaching £300 billion in 2010.

HOW THEY SPEND IT

BME purchasing power is growing with their combined disposable income reaching £300 billion in 2010.²⁰ Of course there are stories of incredible success, but the average minority ethnic Briton has less money to spend than the average white Briton and devotes a greater share of expenditure to basic costs.²¹ The extent to which these consumer patterns are due to people's circumstances or values is unclear because of the conspicuous absence of comprehensive market research.²² We know that white groups spend twice as much as their black counterparts on 'luxury' goods and services, such as restaurants, hotels, recreation and culture. We can guess that this is because black groups have a much lower average income than white groups – or perhaps they have prioritised saving for retirement. Another example is alcohol: minority groups spend about half as much as white groups on it, have higher rates of abstinence but similar rates of dependence. UK born and affluent people within groups also tend to drink more.²³

These examples show that disposable income really only tells us where people spend – not why. Suffice it to say that there are many ways ethnicity can influence attitudes and behaviours by, for example, providing a cultural reference for values or a sense of attachment to people or places. In this section we match consumer spending with market research to show the hidden opportunities within different groups. In some cases we contrast spending with groups' representation in advertising to show missed opportunities. Representing minority ethnic people in a realistic and sensitive manner goes a long way to improve a brand's image with these groups.²⁴

20 | Malik 2011

21 | Hughes 2011

22 | Burton 2010

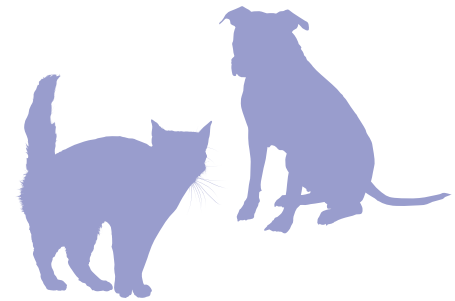
23 | Hurcombe et al. 2010

24 | Lee et al. 2002; Fletcher 2003; Forehand and Deshpande 2001; and Burton 2010



Figure 3: Proportion of household expenditure per head: by ethnic group, 2004/05-2007/08

Source: Hugh 2010



FACT NO 7:

INDIAN HOUSEHOLDS ARE MOST LIKELY TO OWN MULTIPLE CARS OR VANS, WITH

80%

OWNING AT LEAST ONE



COMMUNICATIONS & TECHNOLOGY

BME groups are at the forefront of digital device take-up, being more likely to live in homes with multiple platform access of digital television, internet and mobile phones.

Communications advertising to BME groups is perhaps the biggest missed opportunity as only 3 percent of telecoms, 2 percent of games and consoles and 1 percent of computer ads feature a BME actor.²⁵

Their higher proportional spending on communications is likely explained by their demographic characteristics. Being younger they're more receptive to new technologies, more likely to consider computers essential to studies and want to communicate with their friends cheaply. Having migrant backgrounds they will want inexpensive ways to stay in touch with friends and family or entertainment back 'home'. This matches their higher likelihood of having and spending more than all UK adults on mobile phones and fixed-line phone services.²⁶ Satellite and cable service is also more popular with Indian, Pakistani and black groups.²⁷ As ICT is a popular field for Indian men, they're probably better connected to new technology in both the home and at work.

TRANSPORTATION

High expenditure on transport may be explained by high rates of car ownership and use of public transport.²⁸ Two-thirds of BME people own cars – with Indians most likely to own a car above all other groups – translating to 7 percent of all car owners being from a BME group.

The occasional casting of minority actors in motoring commercials could give the impression that only white people own cars.²⁹ If minorities aren't represented visually in a company's ads, then their attitudes are probably not either. General marketing that is 'colourblind' is likely to miss the mark in developing brand recognition, reputation and loyalty among black and Asian groups. Research on product positioning showed that white Britons placed value for money, economical concerns and durability at the top of their list when considering a car. British Indians prioritised safety, appearance and reliability. When asked to assess models that represented value for money, Indians considered the Ford Ka, BMW and Renault Clio as good value for money whereas they considered the Peugeot 206, Volkswagen Golf and Ford Fiesta as uneconomical. The white group surveyed perceived the inverse to be true.³⁰ The research showed that not only did these two groups place a higher value on different attributes but they also interpreted these values differently. And their existing brand perceptions and preferences probably had a stronger influence than they were willing to admit.

25 Clearcast 2010

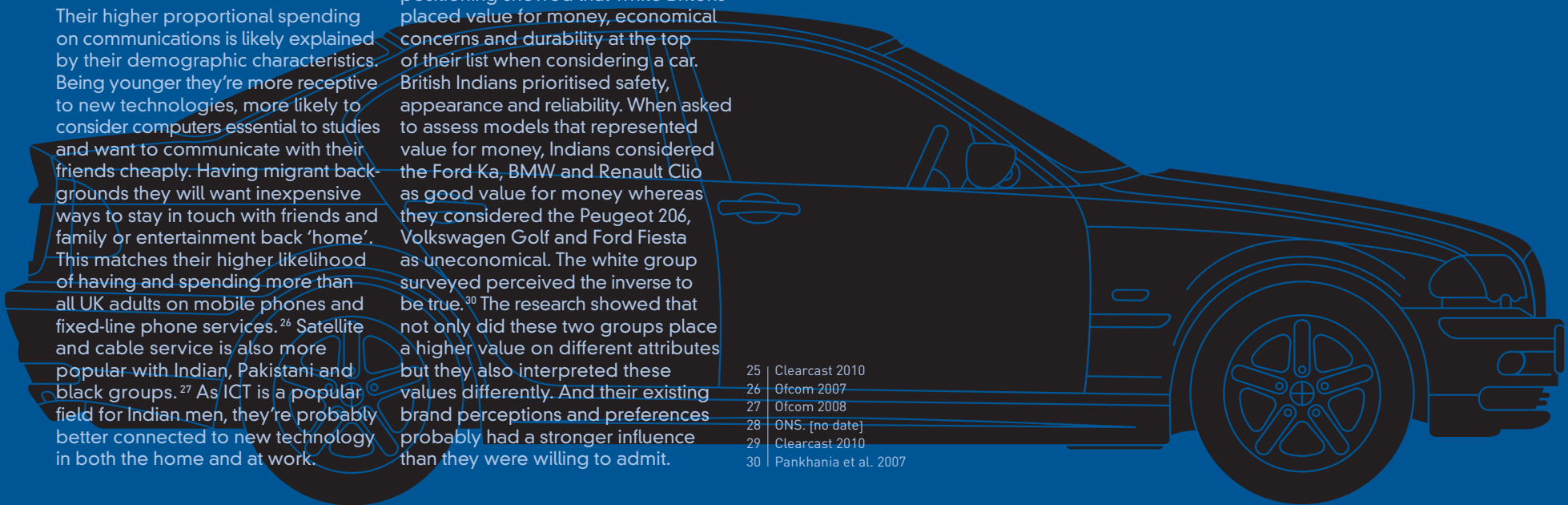
26 Ofcom 2007

27 Ofcom 2008

28 ONS. [no date]

29 Clearcast 2010

30 Pankhania et al. 2007



» All groups, with the exception of Asians, spent the greatest share of their weekly expenditure on housing, fuel and power

HOUSING

Housing tenure varies, with Indians and Pakistanis/Bangladeshis being more likely to own their home and black and 'other ethnic' groups more likely to be renters.³¹ All groups, with the exception of Asians, spent the greatest share of their weekly expenditure on housing, fuel and power.³² Asians have the largest households; 50 percent of Bangladeshis and 43 percent of Pakistanis live in households with four or more people.³³ A high proportion of these households are also multi-adult, which may indicate a tendency among South Asians for multi-generational families to remain under one roof.³⁴ Lower expenditure on housing costs may then be linked to multi-adult households perhaps also being multi-income.



» FACT NO 8: HALF OF BANGLADESHIS LIVE IN HOUSEHOLDS WITH FOUR OR MORE PEOPLE

31 DCLG 2012a

32 Other expenditure includes mortgage interest payments, water charges and council tax. For more see Hughes 2011

33 Platt 2009

34 Markkanen et al. 2008

FOOD AND DRINK

Food and non-alcoholic drink has become a key consumer market, being the third spending priority for mixed, Asian and black groups. 'Ethnic' food is a growing market in the UK and accounts for more than half of the market share in Europe.³⁵ The Authentic Food Company (TAFC) built its Asian ready-meal business in 1985 from a modest £5,000 loan to revenue reaching £50 million this year.³⁶ High street supermarket chains now widely stock diverse products, knowing that people will spend more in shops that have what they want.

This growth is not only due to the increased demand from minority groups but also from mainstream consumers. What was 'exotic' ten years ago has become 'everyday' as Britons are eating more Chinese, Thai and Japanese cuisine and purchasing more accompaniments and seasonings to replicate these

cuisines in the home. Jamie Oliver – most famous for his attention to traditional English and Mediterranean cuisine – recently celebrated the multicultural history of British food in his last Channel 4 series. As a testament to minority influence and changing tastes, 10 years ago chicken tikka masala was announced as the British national dish; this year a poll shows it has been replaced by the Chinese stir-fry.³⁷

» FACT NO 9: CHICKEN TIKKA MASALA IS NO LONGER BRITAIN'S MOST POPULAR DISH; THAT HONOUR GOES TO THE CHINESE STIR-FRY

35 | Datamonitor 2005

36 | Mullaney 2012

37 | Hills 2012

» FACT NO 10: BLACK BRITISH WOMEN SPEND SIX TIMES MORE ON HAIR PRODUCTS THAN THEIR WHITE COUNTERPARTS

16

FASHION AND BEAUTY

Migrants have played a central part in British fashion history, from the imported skills of the Huguenot silk weavers to the influence of the West Indian rude boys and design innovations of the likes of Hussein Chalayan. The V&A devoted an entire exhibition to black Britons' trendsetting, highlighting their style, innovations and inspiration from Britain and beyond.

In this country all minority ethnic groups spend a greater proportion of their money on clothing and footwear than whites. Any follower of women's glossies will remember how Italian *Vogue's* 'black' edition caused such a sell-out sensation that Condé Nast had to reprint 40,000 more copies to meet demand.³⁸ It is hard to understand how this success was unexpected as the presence of black and Asian faces on mainstream covers, fashion editorials or in print ads is atypical indeed.

As cosmopolitans we'd like to think that we embrace no singular standard of beauty and so there is potential for anyone to relate to fashion and beauty ads as they are. The reality is that people have different hair, skin and perceptions of what is beautiful, and so are less

likely to relate to white advertising. Research has demonstrated that advertisements leaning to a western beauty ideal of emaciated rather than glamorous models fail to connect to minority ethnic consumers.³⁹ Also, the money spent to target minority ethnic consumers is likely to be pocket change in comparison with the general spend.⁴⁰ Black British women spend six times more than their white counterparts on the hair products that cater to their needs, pointing to incredible profit potential.⁴¹ How can such 'white' industries be justified seeing as there is such a high demand for clothing, appropriate beauty products and diverse representation?

RECREATION AND CULTURE

BME sports stars and musicians are so ubiquitous it is hard to imagine any area of life more integrated than sports and culture. In fact, minority ethnic people are more likely than white groups to mix with people of a different ethnic background in groups, clubs or organisations.⁴² True, their spending behaviour doesn't reflect their enthusiasm for recreation and culture but we know certain groups enjoy some sports more. Weight training and basketball are more popular among black groups, cricket with Pakistanis, Bangladeshis and Indians, and self defence/martial arts and badminton with Chinese people.⁴³ The more positive stance

38 | Mower 2008

39 | Fletcher 2003

40 | Smithers 2007

41 | Smith 2005

42 | DCLG 2012b

43 | Sporting Equals 2010



» As innovators and trendsetters they are integral to our nation's success and worthy of attention.

BME people had overall to the 2012 Olympics is worth noting, perhaps pointing to excitement about the Games' internationalism, inclusivity and media representation of sports they are more likely to follow.

FINANCIAL SERVICES

Financial products and advice has been flagged as an area for work as BME groups are less likely to have savings or use diverse financial products.⁴⁴ It's possible that these groups have less money to save or that they choose to put their money elsewhere, opting for investment in goods like gold and jewellery, other savings arrangements such as pardna (partnership schemes), or overseas investments or remittances.⁴⁵

All minority groups are less likely to have a private pension in comparison to white men and women. Among minority groups, black women are most likely to save in private pensions.⁴⁶ The UK experiment with auto-enrollment may well replicate the success in the USA in equalising savings and investment behaviour.⁴⁷ Most minority groups are less familiar with pensions and so they will be looking for financial advice to understand the effect of policy changes.

In addition to personal financial advice, there is likely to be demand for business advice due to minority groups' high rate of self-employment and business start-up. Research shows that they are more likely than their white counterparts to have their financial applications rejected, which is surprising when you think how minority small businesses are thriving.⁴⁸

British marketers who neglect minority businesses run the risk of being edged out by international competitors. Vietnamese nail shops are just one example of migrants using their transnational connections to set up and supply their business chains without domestic advice and support.⁴⁹

WHEN ONE SIZE DOESN'T FIT ALL

Britain's minority ethnic groups are not like their white counterparts. Writing them off due to their smaller population size ignores the fact that they represent an increasing number of tomorrow's adults. Dismissing them as hard to reach overlooks that they are more likely to live and study in certain places and work in certain industries. With differences as broad within groups as between, averaging the consumer data for individual minority groups to one large BME category runs the risk of creating a result that is not relevant to any of the individual groups. All of this challenges the rationale for 'one size fits all' strategies.

To fully understand what groups want and why they want it we would need to study different groups' values, attitudes and behaviours. In the United States minority consumers are much better understood and they have been tipped to set trends in the overall population. Britain's minority ethnic population is modest by comparison but has already influenced many areas of British life. As innovators and trendsetters they are integral to our nation's success and worthy of attention.

17

44 | Khan 2010
 45 | Ibid.; McFall 2012; and Vargas-Silva
 46 | EHRC 2011
 47 | Barney 2011
 48 | EHRC 2010
 49 | Bagwell 2008

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And so it came to pass: within hours, the ad, part of a \$1.5m campaign, was pulled, and the Popchips CEO was forced to issue a grovelling apology.

The surprise of this story lies not in the theme, but its details: a young actor browning up in 21st century, hyper-diverse west coast America. Still, this is simply a recent and rather extreme example of a common marketing phenomenon. Because for as long as firms have tried to acknowledge the presence of ethnic minorities, they have been making blunders: usually elementary, sometimes big, often damaging. Not just in America, but here too.

HOW ADVERTISERS SLIP UP

Take the British snack-maker that launched its “Spicy JalFREZI” crisps by plastering sacred Hindu Om symbols all over the packaging. Or the telecoms provider that plugged its cheap calls to Lahore, Pakistan in a right-wing Indian newspaper.

Presumably none of these companies, nor their agencies, set out to cause offence; yet each slipped up. The lesson of all this, you might imagine, would be to avoid the entire mine-field altogether. As the IPA Agency Census shows, staffing in marketing and advertising remains largely white; so for people not expert on the subtleties of reaching out to ethnic minorities, and not mandated to do so, the best thing to do is to steer clear altogether.

Let’s start with a game of Guess the Date. Read this tale of a marketing blunder, and take a stab at when it was made.

Hoping to sell more of its crisps, a snack manufacturer ropes in an actor famous from big and small screen and makes a series of short ads. One shows the (white) star in brown make-up and an Indian sherwani, putting on an accent as thick as the Hoogly. He is, the gag runs, a Hindi film producer called Raj; and he’s looking for love.

So, when do you think that advert was made? The mid-70s, starring Peter Sellers? The late 80s, with Jim Davidson?

Try May 2012. And the actor was Ashton Kutcher, in an internet spot for Californian firm Popchip’s chilli flavour. “This is the Bombay,” declared ‘Raj’, wagging his head from side to side. The video duly went viral – but not the way its creators had intended.

From Twitter to blogs, the criticism – of the actor, of the manufacturer (“I like Popchips; I probably eat them once a week,” went a typical complaint. “Well, I used to.”), the creative agency, even the PR house – was plenty and fierce. One Indian-origin comedian videoed his own slapdown, attacking Kutcher for “not even being racist correctly”.

Chapter two

Marketing to ethnic minorities

» Well over 12% of all people in England and Wales are now from ethnic minorities

And that is what many marketers do, not even featuring minorities in their campaigns. For each of the past two years, the British television copy clearance centre, Clearcast, has been auditing the appearance of black and minority ethnic (BME) actors in TV commercials. The results make dismal reading.

Just over one-in-20 of all ads made in 2011 featured any ethnic minority actors at all; even while well over one in ten of the population is from an ethnic minority. This is a slight drop from the already-low 2010 proportion. In both cases, the chances are that the Clearcast figure somewhat understates ethnic representation, since the surveys rely on creative agencies ticking the relevant boxes.

Precisely what accounts for the year-on-year fall in ethnic representation in commercials is debatable. But one big factor must surely be the cuts in public-sector advertising and, in particular, the winding-up of the Government's marketing hub, the Central Office of Information (COI), one of the most ethnically-aware of all marketers. When it came to using ethnic-minority actors, Government advertising was among the best of all in 2010; last year, it was near the bottom of the pile.

MULTICULTURAL IS MAINSTREAM

Yet simply blanking out Britain's ethnic minorities is untenable. As the previous chapter makes clear, one of the strongest demographic trends in post-war Britain is its increasing diversity. Well over 12% of all people in England and Wales are now from ethnic minorities: a significant proportion of the market.

While others get it wrong, some of Britain's biggest businesses are taking notice. Last year, Marks and Spencer launched a Nearly Naked range of flesh-tone bras. Except, rather than adopt a traditional one-colour-suits-all approach, the bras came in four shades to match a range of skin tones. The colours were chosen after scanning 1,000 customers, and marrying up its research to official ethnicity data. For a very PR-savvy retailer, one major result

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was a satisfying splash in the mid-market press and tabloids. As no less an authority than *The Sun* put it, "Sounds like good nudes to us".

More than just numbers, though, Britain's ethnic minorities are increasing in influence.

Part of this is down to population density. Already, more than one in three Londoners are from ethnic minorities. By the end of this decade, Leicester's ethnic minorities will become its majority population; on course to join it are Slough, Luton and Birmingham.

But growing influence also comes from the characteristics of Britain's ethnic minorities. They are far younger and more urban than their white counterparts. They're also much more likely to be early adopters of the latest phones and technology. They're the ones you can rely on to be first with that shiny new gadget, and whose recommendations can make or break a product.

To put this a different way: marketers too often see ethnic minorities as niche markets they chase for niche

» Just over one in 20 of all ads made in 2011 featured any ethnic minority actors at all

» The ethnic consumer tends to set trends so they help set the tone for how we enter the marketplace

Quote from Neil Golden
Chief Marketing Officer, McDonald's U.S.

products; but it may well be that in some cases ethnic minorities are among the best ways of influencing the mainstream.

Here are two tales of ethnic-minority influence; one capitalised on by marketers, the other still to be recognised.

The first is from the US, where brewers are increasingly reliant on African-Americans and Hispanics to drive growth. But where in the past beer companies would have targeted those ethnic groups separately, more and more they use their niche campaigns in general marketing. One of Coors Light's most successful mass-market adverts was originally dreamed up specifically for blacks, and showed veteran rapper Ice Cube debating with a bottle of Coors Light over which of them was colder. For its part, Budweiser marked Labor Day weekend this year with a music festival headlined by another hip hop mogul, Jay-Z, and featuring a range of R&B and Latin acts. This is a big step for a beer more used to sponsoring country music concerts. But the influence and sheer size of Hispanic and African-American consumers is too big for either Anheuser-Busch or MillerCoors to ignore.

That's a lesson McDonald's has already learned. "The ethnic consumer tends to set trends," McDonald's U.S. chief marketing officer, Neil Golden, told *Businessweek* in 2010. "So they help set the tone for how we enter the marketplace." For that reason, the fast-food chain uses a disproportionate number of minorities in its market research for new dishes and menus – and in its general campaigns.

Compare that story to this one, from the UK. Cars are one of those areas of British TV advertising where – the odd va-va-voom aside – ethnic-minority actors don't get much of a look in. Yet British South Asians are far and away the single most influential ethnic group of all motorists. This finding comes from a fascinating body of marketing research (of which more later) done by Omnicom Media Group Ethnic and Komli Research.

To find out who the real influencers were, researchers looked at three different factors: who was knowledgeable about cars, who was likely to convince others about cars and who regularly posted online reviews. Where those categories overlapped was the influencer territory and the study found that South Asians featured much more prominently than their white British counterparts.

The level of ethnic-minority interest in cars is well known in some parts of the car industry. Saad Saraf, founder of Britain's first ethnic-minority

marketing consultancy, Mediareach, remembers being told by the PR team for Mercedes-Benz: "We struggle to pronounce the names of 85% of the people who buy our cars!" Yet the campaign featuring a South Asian family in a flash new German car is a long way from hitting our screens.

BEYOND GENERALISATIONS

Surprised by that finding about cars? You should be. After all, it's from research of precisely the sort that has been sorely lacking; the kind that looks at ethnic minorities as 3D people, who also shop.

Up until now many studies of ethnic minorities have treated them instead as parts of a problem: to be better integrated or made more successful. This is not to say that issues of social and economic integration don't exist among Britain's ethnic minorities; they clearly do. But there are many other stories that could and should be told about these communities. The fact they aren't is at least partly down to the

» It simply is not the case that advertisers can catch ethnic minorities through the same channels as whites

lack of data, both in demographics and marketing, to back up personal experience. A point often made by those who work in ethnic media is that their audience is understated by the RAJAR and BARB measures.

Talk of a brown pound has at least raised awareness that ethnic minorities do have different spending patterns and consumer needs from their white counterparts. But the term obscures more than it clarifies: going by statistics, an Afro-Caribbean-origin youngster is likely to have a very different experience in education, the jobs market and their career than an Asian-origin Briton. And recent immigrants from accession Europe will spend their money very differently. It would be far more truthful to talk of different ethnic pounds.

This observation, and many others beside, are likely to be confirmed by the 2011 ONS Census. But the single-biggest extrapolation that will probably be drawn is just how large and various Britain's ethnic communities now are. That is likely to surprise many marketing and media professionals.

But it will take a while before those findings are published, and even longer before they are taken on board. So to end, with the help of advertising practitioners from the IPA's Ethnic Diversity Forum, here are three myths about Britain's ethnic minorities, why they're wrong and how to correct for them.

MYTH NO 1: ETHNIC MINORITIES DON'T SPEND

It's certainly true that ethnic minorities overall don't earn as much on average as their white British counterparts. But aggregates cover many of the most interesting parts of the picture. The average British Indian man, for instance, is now on a higher income than his white British counterpart. And according to Starfish Research, BME consumers are three times more likely to own a BMW than the wider population; and twice as likely to own a Mercedes-Benz.

Minority groups can be significant consumers for other luxury brands, points out Mediareach's Saad Saraf. A couple of years ago, he helped organise the launch event for a new range of crystals from Swarovski, designed specifically to be worn with the abbaya cloaks worn by Middle Eastern women.



Even in less rarefied parts of the retail sector, ethnic minorities are making their presence felt. After discount-fashion chain TK Maxx realised that over one-in-five customers in many of its stores were Asian, Manish Tiwari led a project to capitalise on that. The solution from his consultancy, Here & Now 365, was to design a range of gift cards to tie in with the Hindu festival of Diwali. "They were a lot cooler, more avant-garde than your average gift card," recalls Tiwari. Trialled in some of TK Maxx's shops, the effect was dramatic, with gift card sales in its Tottenham Court Road branch up around 40% on the same period the year before.

MYTH NO 2: ETHNIC MINORITIES BEHAVE THE SAME AS WHITES

One simplistic view of multiculturalism has it that, as new communities settle in Britain, they assimilate more and more – until they become indistinguishable from their white counterparts. That isn't true of BME groups, either in the media they consume or their other behaviour.

It simply is not the case that advertisers can catch ethnic minorities through the same channels as whites. Online

» The average British Indian man is now on a higher income than his white British counterpart

panel surveys carried out by Omnicom Media Group (OMG) Ethnic show that only 18% of ethnic minorities in Britain watch only mainstream television. That is almost matched by the 16% that will only ever put on ethnic programming; in between is 60% of ethnic minorities who switch on both mainstream and ethnic minority stations. According to Debarshi Pandit, head of OMG Ethnic, a good chunk of that 60% are second-or-third-generation ethnic minorities who are well integrated into British society but still want a link to their 'own' culture: "If they're raising children, they might want them to pick up their mother tongue".

This point applies more generally to the way ethnic minorities assert their cultural values, says Sanjay Shabi at CultureCom, MediaCom's ethnic-media arm. "If you're an Asian, you can be just like anyone else at the office; go to the pub; have an Italian," he says, "but when you go round your parent's house, you eat samosas and Indian sweets, you watch Hindi films and talk in your mother tongue. Marketers are making a big mistake if they don't understand that both types of behaviour are who you are".

That cultural difference and richness manifests itself in any number of different consumer patterns. OMG's Pandit has worked with John Lewis to tap into the South Asian tradition of large and lavish weddings. Julian Douglas, deputy managing director of creative agency VCCP, notes how black women spend up to six times more on haircare than their white counterparts.

MYTH NO 3: ETHNIC MINORITIES ARE TOO HARD TO TARGET

So there are lots of ethnic minorities, with many differences between them. Some communications specialists might think this tangle of subtleties and nuances is a sure recipe for the kind of disaster that befell Ashton Kutcher and Popchips. Best to leave the minefield alone.

Nonsense, says CultureCom's Sanjay Shabi: "There's a lot of low-hanging fruit to be picked, with relatively cheap, well-targeted campaigns." He gives two examples. First, if you want to sell nicotine patches, you might bear in mind that Bangladeshis are among the heaviest smokers of all ethnic groups; are concentrated in a relatively small part of east London and are often far more comfortable in Bengali than English: "Imagine how effective a drive for nicotine patches might be if directed at that community."

People carriers, his second example, can be difficult to sell in double-dip Britain. But Shabi points out that here too a well-targeted campaign could be very useful: "British Indians have large families, are cash rich and often engaged in entrepreneurial activity, which makes them an ideal market for a large vehicle that can carry either a fair few people or lots of goods."



» Despite turbulent economic conditions in recent times, ethnic media has still managed to retain its foothold

on the playgrounds of London's schools, and ethnic media is developing at such a rate that this wide range of communities continue to witness an increase in the number of media consumption opportunities, from newsletters right through to DAB-based 24-hour radio stations and dedicated satellite television channels.

The ongoing maturing process within the UK's more ingrained ethnic communities, namely Asian and African Caribbean, is resulting in splintering media choice. By and large, marketers of ethnic products still take an 'all eggs in one basket' approach to their audience by providing content that appeals to a broad demographic spread, but various media and spin-off brands continue to evolve, catering specifically to different generations and topics of interest.

While the previous chapters have given an overview of the BME population, where they spend money and how to market to them, this chapter will provide practical information on how to reach these groups.

Despite turbulent economic conditions in recent times, ethnic media has still managed to retain its foothold and, in some respects, has grown and expanded. Generally speaking though, ethnic media has yet to make regular, consistent inroads into mainstream marketing plans.

Whilst this chapter touches briefly upon the UK's media for Far Eastern communities, for practical reasons the emphasis is on media serving the main ethnic groups, namely Asians and African Caribbeans, as collectively they make up about three quarters of the UK's ethnic population. It is however important to recognise and be aware of the extent of the UK's diversity which will become even more evident on release of the hotly anticipated Census data which will continue to roll out in waves throughout 2012 and into 2013. The Office for National Statistics has reported that over 300 languages are being spoken

Chapter three

The ethnic media landscape



by Sanjay Shahi, Head of CultureCom and a member of the IPA Ethnic Diversity Forum

CENTRALISATION OF MEDIA SALES

To counter this pressure, certain media owners like Multicultural and Ethnic Media Sales (MEMS), who alongside Zierler Media (ZMTV) are two of the main sales networks representing ethnic TV channels, have broadened their spectrum of representation. MEMS now handles sales for not only three dozen ethnic TV channels, but also a dozen press titles and over 400 websites whilst arranging sampling opportunities at Melas (outdoor festivals for Asians), carnivals and awards evenings. Subscription services, retail promotions, competitions and product placements are other offerings they provide.

The Jang Group, synonymous chiefly with publishing the *Daily Jang*, the UK's leading Pakistani, Urdu-based newspaper, has long traded on its other assets comprising the highly polished Geo portfolio of TV channels.

Asian Media Group (AMG) and Asian Business Publications have also expanded or at least become even more vocal about their diverse portfolio of opportunities which between them includes an array of regular print products and one-off specials, online, events, publishing and website services, awards, directories and direct marketing. This puts such sales houses in a very strong position, by providing a central point through which a centralised, fully integrated, multi and cross-media channel solution can be achieved.

ORIENTAL MEDIA GROWS

The digital switchover and resultant uptake of more satellite services, which continue to flourish within ethnic groups, has led to the number of ethnic TV channels increasing. This is true even for the Chinese community, which accounts for approximately 0.8% of the UK's total population; while Phoenix Chinese TV, *Sing Tao* and *Epoch Times* are still the leading media serving the Chinese community, Television Broadcasts Limited (TVB) has launched four channels catering for news, children, premium drama and lifestyle. Similarly, the business-orientated *China Daily European Weekly* has appeared, winning Launch of the Year at the 2011 Association of Circulation Executives (ACE) International Awards.

The paper is backed and run by China Daily Holdings which has over 20 print publications, including editions of their *China Daily* branded newspaper for the Chinese mainland, US, Europe, Asia Pacific and Hong Kong, as well as other China Domestic regional publications. Japan Satellite Television (JSTV) is also newly available for the UK's affluent Japanese community. In print, however, ongoing recessionary pressure has resulted in some closures and, in a few cases, a wholesale switch to online-only products to counter the fixed costs associated with ever-rising distribution and paper prices.

» Over 300 languages are being spoken on the playgrounds of London's schools

» It is not unusual for Polish households to install their own satellite dishes to receive Polsat

Rich Visions, an ethnic consultancy specialising in black audiences, are also on the verge of launching their own bespoke ethnic media targeting platform, claiming to reach up to 3 million people of ethnic persuasion.

EASTERN EUROPEANS HERE TO STAY

The influx of Eastern Europeans has continued. Where before, 70% of the migrating inflow were Polish, which reached a record high in 2010, an increasing proportion originate from Lithuania and Slovakia, and to lesser degrees from Romania and Bulgaria. One third of a million flowed in from former Eastern Bloc countries between 2008 and 2011; yet during this period, just under 150,000 left.

Fortis Media, the UK's leading Polish publishing house, has consolidated its position by offering events such as seminars, job fairs and business forums. Even though the numbers of Eastern Europeans continue to grow in the UK, the number of media supporting them has reached a plateau, suggesting that there is some truth behind what the Smith Institute has termed 'super diversity' – where migrant workers bring their 'local' media over with them. For instance, it is not unusual for Polish households to install their own satellite dishes independent of Sky to receive Polsat, which broadcasts 20 Polish TV channels and six radio stations. Similarly, home grown Polish print media can be subscribed to and the easy global capability of digital enables such communities to traverse regions without losing online access to local news and areas of interest.

Local grocery shops selling imported Eastern European groceries are hotbeds for this audience to gravitate towards and receive media, whether they are simply flyers, posters or other in-store distributed methods of communication. The UK-specific launch of *Halo TV* magazine is one exception, as TV viewing is a major facet of Polish life.

LIGHTS, CAMERA, ACTION!

The mainstream cinema sales houses with their Bollywood film packages are gaining burgeoning traction into mainstream multiplexes with some Indian produced movies even reaching the UK's Box Office Top 10! Companies such as Eros International, the world's leading distributor of South Asian film and entertainment, now offer video on demand, much in the same way as Love Film or any other video streaming operation. Even the likes of Love Film are offering a comprehensive selection of Bollywood movies for purchase and viewing. Nollywood, the moniker for Nigeria's film industry, is now the world's second largest producer of movies, ahead of Hollywood but still trailing behind India's film industry. The vast majority of Nollywood films are produced for straight-to-home media like DVDs, meaning many of them cannot be accounted for via cinema tickets sales, exacerbated by the proliferation of video piracy.

DIGITAL, RESEARCH AND ACCOUNTABILITY

As in mainstream markets, online is becoming increasingly enriched by ethnic media. In South Asian circles, Indoor Media remains a convenient, centralised sales function, offering agencies an easy, one-stop shop for a plethora of ethnic web portals.

The on-going issue over lack of research and accountability continues to detract from the value of ethnic media and marketing. There is evidence to suggest that more print titles are receiving accreditation from the Audit Bureau of Circulations (ABC) for independent verification of copy sales, although none, due to relatively low circulations, are able to qualify for inclusion on the eponymous National Readership Survey (NRS), the quantitative readership study used by all prominent agencies when planning print media. In addition, more ethnic TV channels are being monitored on the Broadcasters' Audience Research Board (BARB), the industry platform for measuring audience volumes. Even so, there are still relatively few instances of this, and so the industry continues to struggle in this respect.

» There are increasing instances of channels investing in UK originated content

In addition, independent desktop research such as NRS, BARB and Radio Joint Audience Research (RAJAR) work off ethnic sample sizes woefully short of the national average despite recent attempts by BARB to rebalance this. With the endemic need for such research providers to approach potential sample candidates via randomly sourcing and to successfully recruit ethnic respondents who are willing to participate in such surveys, the industry is left with unreliable data that is far from robust.

To circumvent this, some better resourced media owners like ZMTV, MEMS and Indoor Media have conducted their own in-depth research, revealing insights about ethnic audiences, media consumption patterns and, where possible, products and services too. MEMS' recent UK Ethnic Survey is just one example of this. The work and contributions of all three have been excellent and deeply informative, especially Indoor Media whose findings are directly attributed from their own digital learning and experiences. After all, used correctly, digital is commonly accepted as the most accountable and transparent media channel.

The following is a brief summary of the main media currently available for the UK's larger ethnic communities, namely Asian and African-Caribbean. Full media lists can be found at the end of this chapter.

1. ASIAN MEDIA

Television

There are about a third more TV channels serving this audience since the last IPA report. Much of this growth has come about from free-to-air platforms, and some originally subscriber-only channels switching to free-to-air too.

Airtime can be bought directly from these channels. MEMS and ZMTV are the two sales houses that sell the airtime for most of them. They are efficient ways of accessing such channels, each controlling roughly half the market, and each representing an equally strong combination of paid-for and free-to-air channels.

While most channels are focused on importing content from the Indian sub-continent, there are increasing instances of channels investing in UK-originated content. Sunrise TV, Brit Asian TV, DM and Channel S are worthy examples that provide quite distinct itineraries and approaches.

Some of the larger, more established operations are recognising the need to cater for younger audiences too. Ethnic TV has generally been driven by classic, first generation audiences, but as they peter out subsequent generations need to be considered to ensure broadcasting momentum. Spin-off channels like Zee Café and Star Life OK fulfil this to some extent, as well as newer start-ups like Zing. Colours is one of the bigger launches of late, a direct import from India, where it is one of the most popular stations in its home nation.



Outside the list at the end of this chapter, there is an assortment of other channels but their frequency can be irregular, they may have specialised themes and are often of a lower quality.

Lack of BARB data prevents examination of audience levels for the vast majority, and where they are included, low sample sizes do not give an accurate and fair portrayal of viewing levels. There are about 60 main channels (see page 31).

Radio

In addition to those that are already transmitted via FM and AM, there continue to be a burgeoning number of national Asian radio stations available either on DAB or transmitted via Sky satellite. A simple scan across the radio channels available on Sky illustrates the sheer choice currently available, with some stations aimed squarely at areas like religious programming, Bhangra, vintage Asian music, chat

» The BBC's dedicated Asian programming is likely to experience ongoing funding cuts to the tune of 50% over a five year period

shows, and news and current affairs. A number are reported on RAJAR but, as with BARB, suffer from disproportionately low ethnic sample sizes preventing the generation of robust audience data. A list of the main radio stations can be found on page 32.

Panjab Radio continues to require particular attention. Solely on DAB and Sky Digital, it has made major inroads and appears to be stealing share of listening from its rivals. Some speculate that Club Asia's collapse, which was deemed its direct rival, may in part be attributed to Panjab Radio's success.

Regionally, the list includes Radio XL (Birmingham), Sabras Sound (Leicester) and Asian Sound (Manchester). The Radio Authority also occasionally grants RSL licenses during key festival periods for local Asian stations, which are either offshoots from the existing radio stations or run independently.

In addition to its Asian Network, the BBC also provides dedicated Asian programming across the regions, with many of the regional stations having their own Asian programming services. However, as part of its consultation on cutbacks heralded a couple of years ago, this part of the BBC is likely to experience ongoing

funding cuts to the tune of 50% over a five year period. This will impact mostly on its regional divisions, albeit ironically, as the latest RAJAR data indicates a positive revival in listening figures.

Sunrise Radio Group continues to be a powerhouse in this sector but, again, the latest RAJAR data is showing declining consumption. This is perhaps due to Sky boxes acting as the funnelling gateway for both TV and radio consumption and the greater choice they provide beyond AM and FM frequencies, the advent of DAB, and Sunrise itself not responding quickly enough to audiences beyond its core first generation listening base.

Press

This sector is still hampered by a lack of transparency and independently audited circulation data. Desktop research like the National Readership Survey (NRS) and the Target Group Index (TGI) do not measure their readerships and, even if they did, sample sizes remain questionable.

Almost regardless of economic conditions, the sector has seen some new launches. The launch of titles such as *Bollywood Post* and *Bollywood Glitz* makes sense considering the escalating interest in Bollywood movies and related subject matter. *Ikonz*, which valiantly mimicked the blueprint for *OK!* and *Heat* magazine, closed perhaps because it wasn't sufficiently Asian film based in its celebrity coverage.

One of the biggest print developments has been the Q1 2012 relaunch of *Eastern Eye*. In the wake of Ethnic Media Group's demise, from which Asian Media and Marketing Group (AMG) acquired *Eastern Eye*, AMG used this well-liked brand as an opportunity to refresh its offering, making it even more relevant and appealing to today's British Asian community.

MEMS now represents 11 Asian print products spanning Asian female glossies, Bollywood, trade and business titles, along with headline papers representing Gujarati, Urdu and general interest Indian press.

It is also interesting to note how certain publications are embracing digital ahead of others. *Asian Lite* now offers a full digital conversion of its sister paper product with interactive flip-over pages sent free and regularly to your inbox in an easy to access and read format. Others, like *Confluence*, which has a modest community following in London with little ad support, has reverted to a PDF-only substitute, solely and understandably for cost reasons.

» There are countless ethnic minority communities which have media targeting them, both in their mother tongue and in English

Unfortunately, *Asian Enterprise* and *Asian Journal* both closed in the past 12-24 months even though, anecdotally, both were well respected and received, producing good quality editions. *Asian Enterprise's* launch in 2008 was unforeseeably ill-timed, acting as a credible platform to showcase Asian business achievements when the UK was experiencing acute recessionary pressures. On the other hand, *Business Asia*, modelling itself almost as a pink tabloid version of the *Financial Times*, has now occupied this market gap.

A list of the main, credible titles currently in circulation can be found on page 32, and are a blend of magazines and newsprint titles with daily or weekly frequency.

Websites

Indoor Media are the central sales house for the majority of established websites targeting this community. They represent news portals like *Times of India* (the world's most-read English based newspaper), networking voice boxes and cultural lifestyle sites, as well as matrimonial/dating and job recruitment websites, to name but a few. In total, Indoor Media now look after the interests of 1,200 websites.

In October 2010, Indoor Media were acquired by Komli Media, who are the second largest digital media solution platform in South East Asia with 16 offices worldwide. As a result, Indoor's offering has matured vastly and is the

equivalent of any mainstream aggregated ad sales network, offering beyond the banner/engagement methods, mobile, social and video on demand. They give a much needed shot in the arm for ethnic media and marketing by providing transparency, measurability and accountability in proving effectiveness. They are Comscore rated, ABC audited (using third party ad serving technology) and industry compliant; and endorsing EU cookie laws and offering 'brand safe' environments reassures advertisers of their high hygiene levels.

Events

These can take the form of large scale events attracting large crowds in salubrious locations, with London's Olympia, Birmingham's NEC and The O2 in Greenwich proving to be popular venues. Some are held outdoors in local parks and are called 'Melas' which in Hindi stands broadly for gathering.

Many of these events take place over the course of a few days, attracting tens of thousands. Usually, these are large family events providing a blend of live music and dance performances; guest appearances from Bollywood stars and other famous personalities; retail stalls; fashion, food and drink exhibitions; and are excellent for advertiser sampling opportunities.

There has also been rising interest in events serving the Asian affluent business community on the basis of their relative success and higher propensity to be entrepreneurs.



United Business Media's Asian Awards, now approaching its third year, has provided a magnificent showpiece platform to celebrate Asian success in the UK, attracting the support of a star studded array of luminaries. Sachin Tendulkar (commonly regarded as one of the best cricketing batsmen of all time), Amitabh Bachan (one of Bollywood's greatest actors and now one of its posthumous statesmen) and Vijay Mallya (Force India's Formula One Team boss and business proprietor) are examples of the calibre of individuals involved.

AMG's annual Asian Business Awards is a more overtly business-focused event but both awards are great ways to access and engage with this lucrative audience via various sponsorship packages. Esteemed brands associating themselves with such events have included Lloyds TSB, Lebara, Grant Thornton, HSBC, Chivas, Audemars Piguet, Smythson and Meridian. A selection of the main events are listed on page 32.



» What we must not lose sight of is how the UK's ethnic populations are continuing to flourish and expand

2. BLACK MEDIA

Compared to Asian media, there are fewer media serving this community. This is largely because the black population is smaller overall, and the lower volume of opportunity has a direct impact on the size and scale of the media landscape. Asian communities also seem to have more distinct cultural lifestyles compared to the mainstream white population whereas, to some extent, the black community has integrated more, especially when it comes to language, more commonly using English.

Encompassing Africans and African Caribbeans, black media has remained steady with little change. Overall, this is possibly due to lower cultural and social pressures on these communities. The main television channels and radio stations are listed on page 32. As with the main Asian channels, ZMTV and MEMS are the main contact points for the TV channels.

Press

Ethnic Media Group (EMG) went into administration around two years ago, and while *Eastern Eye* found a happy home at AMG, there was much speculation about the future of EMG's other main title, *New Nation*, aimed at African Caribbeans. Sadly, this has not transpired although, following its departure, *The Weekly World* was launched by a former Commercial Head at *The Voice* and is being driven digitally. After approximately 30 years in publishing, *The Voice*, the most

established newspaper serving this segment, has responded positively by offering its readers a professionally produced, daily email newsletter providing the latest news and commentary.

The main titles are listed on page 32.

CLOSING THOUGHT

This is by no means an exhaustive examination of the media available for targeting these communities as there is a plethora of other channels available; many are quite niche and may require investigation and consideration depending on the objectives to hand. Similarly, there are countless other ethnic minority communities which also have media targeting them, both in their mother tongue and in English; and again for different demographic groups.

What we must not lose sight of is how the UK's ethnic populations are continuing to flourish and expand. Across all generations, there is still a fundamental appetite to consume and embrace media that recognises their unique cultural differences and dials into their personal, cultural perspectives. Ethnic media is borne out of culturally different groups hungry for media content that converses with them from their own point of view, and that in itself points towards ethnic media striving forward.

MAIN MEDIA FOR THE UK'S LARGER ETHNIC COMMUNITIES

ASIAN MEDIA

Television channels:

| | |
|---------------------------|--|
| 9X | General entertainment |
| 9XM | Music |
| Aag | Youth programming, sister channel to Geo |
| Aaj Talk | Current affairs and news |
| Aastha TV | Yoga and self-help |
| Ary Digital | Pakistani general entertainment |
| ARY News | Pakistani news |
| ARY One World | Current affairs and news based |
| ARY QTV | Islamic community |
| ATN Bangla | Bangladeshi general entertainment |
| B4U Movies | Bollywood films |
| B4U Music | Music |
| Bangla TV | Bangladeshi general entertainment |
| BritAsian TV | Bhangra and Asian urban music |
| Channel i | Bangladeshi general entertainment |
| Channel S | Bangladeshi UK based entertainment |
| Channel 9 | Bangladeshi UK based entertainment |
| CiTV | Bangladeshi general entertainment |
| Colours | General Indian entertainment |
| Deepam TV | Sri Lankan general interest |
| DM | British Pakistani entertainment (North England) |
| Ekushey TV | Bangladeshi general entertainment |
| Geo | Pakistani general entertainment |
| Geo News | Pakistani current affairs and news |
| Imagine Dil Se | General entertainment |
| Islam Channel | News for UK Muslims |
| MATV Channel 6 | General entertainment (East Midlands) |
| MATV National | General entertainment |
| mta-muslim tv | Islamic lifestyle |
| Music India | Music |
| NOOR TV | Islamic entertainment |
| NTV | Bangladeshi general entertainment |
| PrimeTV | Pakistani general entertainment |
| PTV Global | Pakistani general entertainment |
| PTV Prime | Pakistani general entertainment |
| QTV | Religious programming for Muslims |
| Raj TV | Asian general entertainment |

Entries struck through denote closures, those in orange indicate new entrants since the last IPA report in 2010

| | |
|--------------------------|---|
| SAB | Comedy, drama and movies |
| Sahara One | General entertainment |
| Sikh Channel | Sikh faith based |
| Sirasa TV | Tamil general entertainment |
| Sony Ents TV | General entertainment |
| Sony MAX | Film, events and Bollywood |
| South For You | Tamil general entertainment |
| Star Gold | Movies |
| Star Life OK | General entertainment aimed at younger viewers |
| Star News | Current affairs and news |
| Star One | General entertainment for younger viewers |
| Star Plus | General entertainment and popular soaps |
| Sunrise TV | General entertainment, UK based content |
| Takbeer/Dawn | Pakistani news channel |
| UMMAH Channel | Islamic lifestyle and education |
| Venus TV | General entertainment, regional languages |
| Wedding Asia | Asian weddings based |
| Zee Cafe | Sports and current affairs for Indian males |
| Zee Cinema | Films |
| Zee Muzic | Music |
| Zee Punjabi | Punjabi general entertainment |
| Zee TV | General entertainment |
| Zing | British Asian entertainment for younger viewers |

Radio stations:

BBC Asian Network

~~Club Asia~~

Panjab Radio

Spectrum Radio

(Not just Asian, catering in total for 22 different languages. Smaller ones attracting very local interest continue to pop up, like Hayes FM in West London, which has a high concentration of South Asians.)

Sunrise Radio Group

Press:*Bangladeshi*

Bangla Post

East End Life

Janomot

Notun Din

Patrika

Surma

Bollywood and film

Bollywood Glitz

Bollywood Post

Cineblitz

~~Iconz~~

Movie

Business titles~~Asian Enterprise~~

Asian Trader

Business Asia

Curry Life

Masala

Tandoori

General interest and news

Asian Age

Asian Leader

Asian Lite

Asian Voice

Eastern Eye

India Today

Indian Post

Gujarati

Garavi Gujarat

Gujarat Samachar

Muslim

Emel

Muslim News

Muslim Post

Muslim Weekly

Sisters

Pakistani

Daily Ausaf

Nawai Jang

Pakistan Post

The Daily Jang

The Nation

UK Time

Punjabi

Des Pardes

Sikh Times

(online only)

Sri Lankan

Newslanka

UK Lanka Times

Women's Glossies

Asiana

Asian Woman

BLACK MEDIA**Television:**

AIT

BEN

FAITH

Hi-TV

Nollywood

OBETV

OHTV

Nigerian based general entertainment

General entertainment

Gospel entertainment for African Caribbeans

General entertainment

Nigerian based movies

Ghanaian general entertainment

General entertainment for African Caribbeans

Radio:

Choice FM

Urban, Rap Reggae, Soul/R&B

Kiss FM

House and Dance

Premier

Christian Radio

Religious

Spectrum Radio

Ghanaian programming

The Voice of

Africa

London based community format

Press:*Newspapers*

African Voice

Nigerian Watch

The Afro News

The Gleaner

The Trumpet

The Voice

The Weekly World

Women's Glossies

Aspire

Pride

Urban Music and Youth

Knowledge

RWD

Young Voices (online only)



GLOSSARY

| | |
|-------|---------------------------------------|
| ABC | Audit Bureau of Circulations |
| AMG | Asian Media and Marketing Group |
| BARB | Broadcasters' Audience Research Board |
| BME | Black and minority ethnic |
| DAB | Digital Audio Broadcasting |
| EMG | Ethnic Media Group |
| JSTV | Japanese Satellite Television |
| MEMS | Multicultural and Ethnic Media Sales |
| NRS | National Readership Survey |
| RAJAR | Radio Joint Audience Research |
| TGI | Target Group Index |
| TVB | Television Broadcasts Limited |
| ZMTV | Zierler Media |

CLEARCAST CALCULATION

Clearcast calculation of BAME representation in commercials (2011):

This second set of data from Clearcast for the IPA is based on a sample of 33,944 clocked commercials.

5.1% (1,729) have BAME actors compared to 5.3% in 2010
 4.3% have featured BAME actors compared to 4.7% in 2010
 2.0% have walk-on BAME actors compared to 2.1% in 2010

The significant product categories are: household equipment, online retail, business and industrial, entertainment, media and alcohol.

Government advertising has plummeted after its budget cuts. It previously indexed above 100 for BAME actors in 2010.

Clearcast say their figures are likely to underestimate the number of commercials with BAME actors due to how it gathers this information which is voluntary.

IPA AGENCY CENSUS

The IPA began to gather information on its members' ethnic makeup in 2002. The figures are:

| | |
|------|-----------------------------|
| 2011 | 9.4% |
| 2010 | 10% |
| 2009 | 8.9% |
| 2008 | 8.4% |
| 2007 | 7.3% |
| 2006 | 7.3% |
| 2005 | 6.9% |
| 2004 | 5.1% |
| 2003 | 8.5% |
| 2002 | 4.3% (first-year reporting) |

FURTHER READING

IPA. 2010. *The Future of Work: An IPA member agency perspective in association with Working Families*. London: IPA.
<http://www.ipa.co.uk/Document/Future-of-Work>

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IPA. 2010. *The marketing opportunities for advertisers and agencies in today's multi-cultural Britain: An interim report by the Ethnic Diversity Forum*. London: IPA.
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