



# REACHING THE ETHNIC CONSUMER: A CHALLENGE FOR MARKETERS

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# Contents

Introduction & Objectives	2
Summary of findings	3
Findings	4
Implications	9
Acknowledgements	9
Methodology	10
Appendix 1: Sample framework	10
Appendix 2: Representation of ethnic minorities in television advertising	11
Appendix 3: Representation of ethnic minorities in print advertising	16

## Introduction

Minority ethnic audiences in the UK represent a significant cultural and consumer force.

Increasing ethnic and cultural diversity – like other forms of societal change – represents both a threat and an opportunity to marketers. New consumer segments can provide fresh sources of top-line growth with focused new product development. However, diversity can also mean audience fragmentation, making mass appeal products and mass communications less viable.

**Marketers are typically unaware of whether or how their own behaviour needs to change to meet the challenge of diversity. This is in marked contrast to media, employers and policy-makers, all of whom are keenly aware of the issues arising from ethnic diversity.**

To help address this, MediaLab the research division of Mediaedge:cia, has worked with Channel 4, News International and the Broadcasting Standards Commission to investigate the effectiveness of mainstream advertising amongst the larger minority ethnic groups in the UK.

This report summarises the findings.

## Objectives

The study aims to provide a qualitative overview of how cultural differences of the larger minority ethnic communities affect their consumer behaviour, use of media and response to marketing communications.

In addition, the report provides an analysis of diversity within mainstream advertising content.

## **Summary of findings**

- 1. Minority ethnic audiences represent a significant opportunity for brands**
  - A strong status-orientation and conspicuous consumption combine to make brands disproportionately important compared with the mainstream.
  - Many major purchases are subject to strong family-based decision making.
- 2. Some advertising fails to connect**
  - Advertising is perceived rationally and consciously as performing a functional selling role.
  - Non-literal communications are least likely to connect, particularly with Asians. Part of this stems from advertising per se not being adopted as a positive aspect of British culture.
- 3. Advertising executions reflect diversity only in the background**
  - Visual advertising (TV, print, posters) is manifestly diverse at 'headcount' level.
  - However, this diversity is strong only in multi-character executions, and there is a disproportionately low number of dominant character representations from minority ethnic communities.
  - Such non-white minority ethnic characters that do feature, are disproportionately Black rather than Asian.
- 4. Using minority ethnic characters is a double-edged sword**
  - Use of minority ethnic actors in settings draws strong, resonant attention to the creative execution, but tends to polarize the community between those who see the individual representation as positive and those that see it as tokenistic or stereotypical.
  - Inclusion brings scrutiny of the individual representation – respondents evaluate the executions not only on the basis of personal relevance but also on the basis of "what does this say about us?" to the rest of society.
- 5. The impact of mainstream culture on minority ethnic culture**
  - The family home provides a cultural 'earthing point' which protects the traditional culture and ensures that this is passed on from generation to generation.
  - Western influences affect different aspects of life – notably out of home - whether in the workplace, at study or at leisure. This changes dominant values and with it, behaviour in consumer marketplaces.
  - Mainstream culture is adopted when relevant, as part of a conscious process. Typically, British aspects of a (relatively) ordered, meritocratic society are seen as positive and adopted, whereas attitudes to morality are seen as negative and therefore – at least in the cultural fortress of the family home – rejected.
- 6. There is demand for culturally-relevant marketing**
  - Communities see an opportunity for brands to augment existing, mainstream campaigns with more focussed targeting, sympathetic to the culture – such as special offers, in keeping with major festivals.
  - As in other areas of life, there is now an expectation that brands should behave in an inclusive fashion.
- 7. Media consumption habits reflect a composite of mainstream British media and cultural specific consumption**
  - Most households are multi-channel, to provide access to specialist channels.
  - Mainstream viewing is orientated towards peak programming.
  - BBC and Channel 4 are seen as ethnically sensitive broadcasters.
  - National Newspapers – even tabloids – are seen as independent and authoritative.
  - Local newspapers/radio are consumed as part of strong community orientation.
- 8. Generalisations are relevant within limits**
  - Minority ethnic communities are as internally diverse as they are distinct from mainstream culture.
  - Generation, age, language, location and country of origin are significant variables that determine the extent to which minority ethnic audiences move outside of purely traditional culture.
  - For the purposes of this study, the relative lack of inclusion within advertising provides a de facto unifying dimension that clearly separates the minority ethnic audiences researched, from the ethnic mainstream majority.

We believe that these findings should cause advertisers to re-assess the commercial opportunity for enhanced inclusiveness.

We also believe that it is incumbent on the industry, and the leading advertisers within it, to continue to work to normalise the inclusion of minority ethnic communities in dominant positions in creative strategy.

## Findings

### Culture and acculturation

Culture was understood by most respondents to be a composite of:

- country of origin,
- language,
- history,
- traditions/customs,
- religion.

(Religion clearly informed and was supported by several of the other dimensions.)

This was a significant driver of sense of identity, particularly for Asian and African respondents, but was less marked amongst Caribbeans. In general, differences from mainstream behaviour are more marked for Asian audiences than for Afro-Caribbeans, but typically in the same direction. The report thus concentrates on Asian audiences and reports Afro-Caribbean variation by exception.

**A strong sense of a historically informed, continuing and cohesive culture, which is readily articulated, allows for mainstream British culture to be seen in contrast with traditional culture, segmented and then adopted or rejected accordingly.**

Thus as a generalisation, the material and welfare state benefits of an ordered, meritocratic society are adopted as being without prejudice to traditional culture. This includes tangibles such as education and healthcare, but also intangibles such as politeness.

Other tangibles such as language, food and dress are also adopted, but these augment rather than replace traditional culture, with behaviour differing depending on the context. This is not of itself a new phenomenon – it is well established that the same individual will have different dominant values and behaviours as a function of role or context (e.g. husband/ father/ businessman/ football supporter/small investor/car bore etc.). However, the augmentation of culture causes apparent conflicts – such as the acceptability of alcohol or mixed gender socialising – which are resolved by context.

It is also important to recognise that the changes of context happen in a number of different, but simultaneous cycles. For the individual, context will vary across a working day (in the family/cultural home – at work in dominant culture – returning home), across a working week punctuated by regular social occasions, across a year of religious/traditional festivals, and as a function of lifestage, where key events (birth, marriage, death) lead to an immersion in traditional culture.

**Acculturation – the extent to which one culture absorbs the traits of another – is thus not a linear process where various aspects of traditional culture are lost as mainstream or host culture traits increasingly dominate and replace traditional culture.**

(It is also worth noting that acculturation is not a one-way phenomenon of minority cultures adopting mainstream traits, as it is clear that mainstream culture is increasingly adopting some aspects – notably in food, arts/media and spirituality – from minority cultures. This is again, not a replacement of mainstream culture, but an addition, which expands the range of cultural experience and behaviour. It is also worth noting that as some aspects of traditional minority ethnic culture become more mainstream, they do so via the well documented early adopter process. Brands looking to reach cultural early adopters should therefore be sensitised to minority ethnic culture, in order to be well placed to identify such trends at the outset.)

Clearly there are generalised differences as a function of generation, age, location and country of origin. For example, some Asians within strongly Asian communities never need to move outside of traditional culture, since all economic and social activity can take place in a completely Asian context.

The family provides a cultural as well as literal home, and works to cascade cultural values from generation to generation.

More liberal, and typically younger groups of Asians are more likely to adopt mainstream patterns of social behaviour (e.g. pubs and clubs, mixed gender socialising) albeit most likely within an Asian context (i.e. with Asian friends).

Finally, regardless of the degree of acculturation, a sense of identity – however expressed – remains strong: even the most mainstream in behaviour would typically describe themselves in terms of traditional culture.

### **Cultural influence on consumer behaviour**

*Food and drink* markets exhibit the same 'augmentation' dynamic. Thus traditional foodstuffs are augmented with other cuisines, especially convenience and take-away products. Grocery shopping follows the same pattern, with traditional foods bought in bulk from specialist retailers and other mainstream groceries from mainstream retailers.

*Durables* behaviour reflects the strength of the family and the extended family unit, with joint, family-orientated decisions and recommendations the most dominant influences.

*Financial services* reflect the same 'significant purchase' dynamic as durables, with family and recommendations playing a major role. Asian audiences are typically debt averse – and in some instances constrained from taking on debt through religious observance. There is also a self-belief in the ability to shop around for the best deals in the marketplace for any particular product type. Afro-Caribbean audiences are more circumspect in their willingness to discuss financial service behaviour.

*Leisure* markets reflect strength of the family unit and the dynamic of augmenting traditional culture, although this does vary by demographic. Thus:

- Housewives – at the centre of family life – are most likely to stay within a traditional cultural domain with social activities revolving around the home and family. Shopping with family/friends and entertaining/visiting family dominate alongside TV and radio consumption.
- Men are also family orientated, but will engage in community based leisure such as sports clubs – both playing and coaching youth teams.
- Younger children are augmenting Asian music/cinema/TV with western music/cinema/TV. Sport is seen to be culturally acceptable on the basis of being community orientated, alcohol-free and single gender.
- Older children – notably those in tertiary education – are most exposed to mainstream culture and at this point most likely to adopt pubs/clubs into their leisure repertoire. In common with other youth markets, technology-based leisure (games, internet, mobile comms etc.) are universal, alongside a near voracious appetite for celebrity gossip.

**Across generations there is a clear desire amongst parents to protect the integrity of their culture for their children and ensure a 'conventional future' – good job, secure marriage, children etc. For older children, there is a strong desire to balance their own wants and needs – including adoption of mainstream culture – with those of their parents.** This results in an implicit 'negotiation' between generations, together with an understanding that some behaviour (e.g. mixed gender socialising or consuming alcohol) is tolerated, as long as it is not 'brought home' in discussion etc.

### **Media consumption**

Almost without exception our sample had access to multi-channel television in order to access culturally relevant programming or channels – the latter more acute with Asians where Star Plus, Sony TV and Zee TV provide non-English language programming.

Again the twin drivers of family and augmentation are evident. A lot of mainstream English language television is consumed, and this revolves around the full range of peak (thus 'safe' for family) programming, incorporating soaps, game shows, reality TV, news and documentary programmes. Music and sports programming, usually from vertical channels, were also significant, especially for Afro-Caribbeans.

Channel 4 was seen by Afro-Caribbeans to be distinct in its understanding of minority ethnic communities, although all groups were generally dismissive of mainstream broadcasters' attempts to offer bespoke programming.

Newspaper consumption encompassed national and local titles, with Asian audiences in particular, considering newspapers to offer independent and authoritative reporting.

Local newspaper and radio consumption reflected the strength of media identifying with their local communities.

Magazine consumption revolved around TV listing and celebrity genre, reflecting the importance of celebrities across all media channels.

Music radio for Afro-Caribbean audiences was an area of focus, but it is important to understand that consumption was not restricted to Black/MOBO stations but also encompassed mainstream commercial/BBC brands.

### **Importance of brands**

Pursuit of status and conspicuous consumption are key traits, most notably for Asians. This is refreshed from generation to generation in an inversion to the mainstream norm – whereas most parents frequently try to get their children to trade down from brand names, some of our respondents would effectively encourage their children to trade up to more status-orientated brand labels.

This in part explains a disproportionate affinity for celebrity in so far as celebrities are in effect, aspirational 'people brands'.

**It is not necessarily an advantage to be a brand with a strong 'ethnic' heritage. Whereas worldwide brands were almost universally aspired to, some brands perceived to be disproportionately associated with country of origin could polarise respondents – these brands remained strong in the community, but in practice younger respondents would, frequently look to distance themselves from the brand, precisely because it "is an Asian brand".**

### **Some advertising fails to connect**

The main dynamic of traditional culture being selectively augmented with mainstream culture affects minority ethnic audiences' view of advertising.

British advertising has a strong 'internal' culture, and there are some signs that advertising has not been adopted into culture on a wholesale basis, and to that extent the culture and heritage of advertising is not understood.

Allied to this is a typically rational approach amongst Asian respondents, which when applied to advertising makes non-literal communication – a key component of contemporary advertising – less effective.

Respondents articulated advertising as being there for a clear purpose – to sell. A willingness to be 'sold to' exists and creativity in the form of entertainment (through humour, celebrity etc.) and engagement is clearly appreciated, but there is a disproportionate need for advertising to provide a clear product performance message, which can be rationally decoded.



**Examples of where advertising failed to connect included fashion campaigns where models looked emaciated rather than 'glamorous': this disconnect confused and undermined the advertising – even where both brands and clothing themselves were appropriate.**

Use of strong sexual imagery was also an issue for respondents, although less significant than might have been expected given religious influence. Asian respondents in particular were less offended than they were disengaged – ads that crossed a cultural acceptability barrier were thus placed alongside a number of other elements of 'rejected' mainstream culture.

Context, however, remains significant – the same ad might be rejected in a family setting (such as TV or posters in the community) but accepted amongst younger groups when in isolation (such as cinema or more targeted magazines).

### **Advertising executions reflect diversity only in the background**

Two studies were conducted:

1. TV content analysis was commissioned by the Broadcasting Standards Commission (BSC). The BSC has monitored minority ethnic group representation within programming since 1997. The advertising study commissioned for this project used the same methodology and same sample as used for the most recent editorial monitoring<sup>1</sup>, providing a robust and valid programming benchmark. (The full results of the advertising study are appended.)

The TV analysis showed that almost one in seven (13%) participants were from an ethnic minority. Whilst this is significantly higher than in programming (9%) such appearances are characterised by being in predominantly in minor or 'background' roles and in commercials with a higher number of total participants.

**Essentially the broad conclusion is that crowd scenes are typically diverse but that smaller situations are typically white.**

Another characterisation is that the profile of included minority ethnic participants is heavily skewed towards Afro-Caribbeans.

2. Press analysis was conducted by a postgraduate team at Leeds University Business School, using a sample of national daily and weekend newspapers, supplements and the highest circulating consumer magazines. The same team, using a limited sample of current campaigns, conducted outdoor execution analysis.

Press analysis closely mirrored the TV findings, with 9% of characters from clear minority ethnic backgrounds, of which 56% were black and only 11% in sole/major positions (c.f. 19% for white). Outdoor analysis lacked statistical significance but anecdotally concurred with TV and press findings.

### **Minority ethnic casting and situations polarise**

The use of minority ethnic characters and situations in advertising brought immediate attention both as a result of cultural resonance and as being in marked contrast to the norm. However, with this incremental attention came additional scrutiny, which then polarised respondents.

Polarisation is itself a reflection of the internal diversity of minority communities, and the necessarily simplistic portrayals of characters in advertising material.

The issues are very close to those of stereotyping and tokenism clearly identified in programming.

<sup>1</sup> The most recent programming analysis is to be found in Multicultural Broadcasting: concept and reality; Andrea Millwood Hargrave; British Broadcasting Corporation, Broadcasting Standards Commission, Independent Television Commission and The Radio Authority, 2002.

Thus what is a progressive use of a realistic projection of a minority ethnic character to one respondent is another's token or stereotype; one person's resonant "we're like that" is another's rejection of stereotype "we're not all like that".

A secondary issue is the extent to which respondents see minority portrayals in advertising as being representative of the community in mainstream society. Ads are thus viewed not only on the individual relevance to the individual as a consumer, but on the basis of "what does this say about us to the world at large".

The corollary of this dimension is an associated importance with and a desire to see more minority ethnic characters within advertising. This was seen as important to respondents because of their integral inclusion in society (indeed the 2002 General Household Survey has found that more members of minority ethnic communities describe themselves as "British" than do mainstream white individuals<sup>2</sup>). In this respect Afro-Caribbean respondents were significantly more vociferous than were Asian respondents, mirroring findings on editorial issues<sup>3</sup>.

### **There is demand for culturally relevant marketing**

In addition to demand/desire for inclusion in advertising, respondents also expected or wanted targeted marketing that would speak to their particular desires and needs.

This was articulated on the basis of the opportunity for brands (and especially larger brands) to augment, rather than necessarily change behaviour in order to be relevant. Festivals – with associated gifts and special foods – in particular provide opportunities to connect with relevance. As with issues of representation, any such activity would need to avoid tokenism.

Respondents saw the potential for such activity not only as relevant in its own right, but providing a corporate opportunity to connect with a community, seen as an opportunity to gain brand respect.

<sup>2</sup> The General Household Survey (GHS) is a multi-purpose continuous survey carried out by the Social Survey Division of the Office for National Statistics (ONS) which collects information on a range of topics from people living in private households in Great Britain

<sup>3</sup> Multicultural Broadcasting: concept and reality; Andrea Millwood Hargrave; British Broadcasting Corporation, Broadcasting Standards Commission, Independent Television Commission and The Radio Authority, 2002.

## Implications

There is a clear disconnect between the opportunity for brands and the relative generic impotence of advertising.

This requires advertiser-by-advertiser consideration. An inherent issue is in the literal reality of minority components in an advertiser's target audience – building communications strategies from a perspective of a relatively small component is liable to result in a greater effectiveness loss amongst the majority than a gain against the minority. This is particularly the case when the minority is itself internally diverse.

However, in an age when any marginal performance improvement is to be prized, advertisers should at least check whether communications are likely to be less effective amongst minority ethnic audiences, and then consider counter or trade off policies as relevant.

There are some easy wins for brands around particular minority ethnic audience needs or opportunities.

Inclusion of minority ethnic characters in advertising remains a vicious circle. It can be argued that the relative impotence of advertising amongst minorities is inextricably linked to the lack of diversity within advertising content. However, when inclusion is a double-edged sword, even amongst minority audiences, the individual advertiser can justifiably question the validity of seeking to be more inclusive, so the problem persists.

**We believe that it is incumbent on the industry to 'normalise' minority ethnic inclusion, to break the vicious circle and that it is the larger advertisers who should take a leadership position on the issue.** Larger advertisers typically enjoy larger brand portfolios – increasing the opportunity to be inclusive across a season of campaigns – and larger consumer franchises – increasing the imperative of effective coverage across communities.

Significant barriers exist and should not be underestimated – in particular the relative shortage of minority ethnic talent available to be cast, and advertising not being seen as an aspirational occupation for some minority ethnic groups.

The industry, and external policy makers and influencers, should seek to reward those who persist in seeking to be inclusive.

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## Methodology

Primary research was conducted in four stages:

1. **A quantitative analysis of diversity within advertising.** For television, this was conducted by The Communications Research Group and commissioned for us by the BSC. Print and poster diversity was analysed by a post-graduate team at Leeds University Business School, who also undertook a pilot qualitative study to help develop hypotheses.
2. **A series of individual interviews conducted in homes,** with all members of the household. Asian (Indian, Pakistani and Bangladeshi), African and Caribbean homes – a total of 45 - were researched, by minority ethnic research specialists, Marketing Synergie International Ltd (MSI). This stage primarily focussed on understanding culture and consumer behaviour, with some exploration of advertising.
3. **Four group discussions** (three Asian, one Afro-Caribbean, moderated by MSI) to further explore relationships with brands and advertising.
4. **A workshop with Asian consumers** (moderated by MSI) to reflect back some of the findings and explore relevant strategies for brand owners to adopt.

The research and fieldwork was carried out during September and October 2002.

## Appendices

### 1. Sample framework

All individuals were interviewed in each home – a total sample of c.200 individuals

Homes	London	Birmingham	Leicester	Bradford	Total
Indian -Punjabis	2	3		3	8
Indian - Gujaratis	2		4	2	8
Indian Other	2				2
Total	6	3	4	5	18
Pakistanis	4		2	4	10
Bangladeshis	5				5
Africans	4	2			6
Caribbeans	4	2			6
Total	23	7	6	9	45

## **2. Representation of ethnic minorities in television advertising**

The Broadcasting Standards Commission commissioned the following report for this project.

### **2.1 Summary**

- A two-week sample of adverts on prime time output from the three terrestrial commercial channels showed that almost one in seven participants were from an ethnic minority.
- This is a much higher representation of ethnic minorities than found in programmes.
- Black people heavily outnumbered other ethnicities.
- Asian representation was very small, especially in major roles.
- Ads containing ethnic minorities, on average, contained far more participants than those, which did not.
- Ethnic minority appearances were far less likely to be prominent ones compared with their white counterparts and were far less likely to be in a major role.

### **2.2 The sample**

The sample was of 273 hours of broadcast television comprising all prime time transmissions from the three U.K terrestrial commercial channels over a two-week period. This consists of two separate composite weeks (each spread over seven days) captured in autumn/winter 2001 and spring/summer 2002. All adverts screened between 17.30 hours and midnight on Central; Channel 4 and Channel 5 (now Five) were included.

In total 5,591 ads were captured. All the participants were counted and all ads that included any non-white participant (ethnic minority or otherwise) were analysed in detail. In addition, a base sample was drawn for comparison purposes by, wherever possible, taking alternatively the ad preceding or the one following each ad with non white representation. A total of 2,831 ads (51% of all those transmitted) were analysed in detail. These had a combined duration of 1,276 minutes (average = 27 seconds per advert).

### **2.3 Overall frequencies**

Of the total 5,591 ads transmitted, some 692 (12%) could not be coded for ethnicity (such as cartoons or inanimate objects with voiceovers only). Of the remainder (4,899 ads) a total of 1,423 (29%) contained non-white participants. Of these, 102 did not include ethnic minorities (being located in Africa etc). Thus a total of 1,321 ads contained ethnic minority participants, representing 27% of all those which could be coded for ethnicity (or 24% of the total ads transmitted). The base sample comprised 1,408 ads.

### **2.4 Demographic details**

The total population appearing in the ads transmitted was 24,912 participants.

- A total of 3,905 were non-white, which represents 16% (15.7%) of all participants.
- A total of 3,277 were members of an ethnic minority group, representing 13% (13.2%) of all participants.

This last figure may be compared with the BSC 2001 programme data, which showed an equivalent figure for these three channels of 9% (8.6%) ethnic minority representation.

Thus, on average, ethnic minorities achieved some 53% greater participation in television ads than they typically do in the programmes in which they are embedded.

### **2.5 Level of appearance**

All participants were coded for level of appearance so as to compare results with other BSC monitoring. The categories 'major', 'minor' and 'background/incidental' cannot be used in precisely the same way when applied to a ten second advert as to a one hour drama. However, the concepts are equivalent and can be applied consistently to reveal equivalent similarities or differences according to the different kinds of participants.

Table 1 shows levels of appearance for ethnic minority and white people within the same ads plus the levels of appearance of white people taken from the base sample.

**Table 1: Ethnic minority versus white participants by level of appearance**

Participants	Ethnic minority	White in ethnic minority ads	White in base sample ads
Level of appearance	%	%	%
Major	11	17	30
Minor	25	26	28
Inc/background	64	56	42
Total %	100	99	100
Total N	3277	9527	3890

Thus, ethnic minority participants are notably less likely to become major participants than their white colleagues even when they appear in the same ads (11% versus 17%). Furthermore, their white counterparts in the base comparison sample are twice as likely (30%) to enjoy a major role.

One obvious reason for this is that, on average, ethnic minority ads contained far more people (average almost 10 per ad) than the base sample (average 3 per ad) even when those with voiceovers only are excluded. Thus with far more people in an advert there would be less opportunity for ethnic minority participants to play a major role. Indeed, in the ads containing ethnic minority representation, there were almost three times as many white people as ethnic minorities (74% white versus 26% ethnic minority). Nevertheless major roles were split 81% white versus 19% ethnic minority revealing the clustering of ethnic minority representation in background/incidental roles (which were split 72% white versus 28% ethnic minority).

## 2.6 Ethnicity by level of appearance

Overall, more than seven out of ten (76%) of the ethnic minority participants were Black with Asian people contributing just 15% and 'other ethnicities' a further 9%. 'Other ethnicities' were mainly Far Eastern (contributing almost 7%) with Central/South American people making up almost 2%. Black people were predominant at all levels of appearance. However, the modest overall contribution of Asian participants is very much reduced at the major level where they contributed a mere 10% of appearances. The reverse is true of 'other ethnicities', which are relatively prominent in major roles (at 21%) compared with their overall representation. Here, Far Eastern people contributed most (17%) with very small contributions from others such as Central/South American people (2%).

Table 2 shows how the various ethnic groupings were distributed in terms of level of appearance. This reveals that Black and Asian participants were relatively less likely to enjoy a major role compared with their white counterparts. However 'other ethnic' participants (mainly Far Eastern) – despite their low numbers overall – were relatively more likely to appear in major roles.

**Table 2: Ethnic groups by level of appearance (ethnic minorities)**

	Black	Asian	'Other'	All eth min	White
	%	%	%	%	%
Major	11	8	28	12	17
Minor	26	29	23	26	27
Incidental	64	63	50	62	56
Total	101	100	101	100	100

## 2.7 Product type

While the list of product types for the base sample appears broadly similar to those for the ads containing ethnic minorities, there are some notable differences, as shown in Table 3 overleaf. For both groups, shops and restaurants (including fast food outlets) is the largest category (16% ethnic minority, 14% base). However the second most frequent in the base sample: personal maintenance (15% of base ads) occurs with far less frequency in the ethnic minority sample (9%). This is even truer of household maintenance (7% base; 2% ethnic minority). Thus, overall, house and personal maintenance ads were twice as common in the base sample (22% versus 11%).

A greater proportion of ads including ethnic minorities were for gaming (3% versus almost zero in the base sample), clothes and jewellery (4% versus 2% base), publications, including films and music (9% versus 6% base), utilities, including telecommunications (9% versus 6% base). Also noteworthy are public service/charity ads (6% versus 3% base). These included a large number by the Central Office of Information where ethnic minority representation was common, with the notable exception of car crime and benefit fraud ads.

**Table 3: Ethnic minority versus base participants by product type**

	Base advert	Ethnic minority advert
Product type	%	%
Cereal	2	1
Confectionary	5	6
Food	8	4
Beverages	1	1
Soft drinks	2	1
Alcohol	3	4
Gaming	--	3
Pet food	--	--
Household maintenance	7	2
Personal maintenance	15	9
Clothes and jewellery	2	4
Small inexpensive consumer durables	--	1
Large expensive consumer durables	2	1
Cars	6	4
Travel & transport	1	1
Financial services	8	9
Corporate	2	5
Utilities	6	9
Shops/restaurants	14	16
Leisure	5	5
Publications	6	9
Toys & games	--	--
Public service/charity	3	6
Total	100	101

## 2.8 Tone of advert

The majority (73%) of ads were classified as 'everyday serious' (41%) or 'everyday light hearted' (32%). In only a minority of the remainder did differences emerge. The tones 'exotic', 'gritty' and 'funky' were almost exclusively the reserve of those ads that enjoyed ethnic minority representation while 'wacky/zany' was applied twice as often compared with the base ads.

**Table 4: Ethnic minority versus base adverts by tone of advert**

	Base	Ethnic minorities
	%	%
Wacky/zany	2	5
Ordinary comic	12	14
Surreal/arty	2	2
Scientific	1	--
Sensuous/sexy	1	1
Romantic	*	*
Exotic	1	2
Gritty/menacing	*	2
Funky	*	2
Homely/cosy	1	1
Everyday serious	42	39
Everyday light-hearted	32	31
Other	4	1
Total	98	100

\* less than 1%

## 2.9 Position and timing

Ads containing ethnic minority representation appeared fairly evenly spread within and across all ad breaks. Thus, over one third (34%) were either first (17%) or second (17%) in an ad break.

Examining each half hour segment from 17.30 through to midnight showed no notable peaks or troughs. Each time segment contributed 7-8% of all ads containing ethnic minorities.

## 2.10 Repeated ads.

There were very few ads repeated between the autumn/winter period and the spring/summer sample. However it is not easy to determine just how many ads in a large sample such as this are unique and how many are repeated within or across channels. Each ad, when it was coded, was given its own unique copy number (a thirteen character alpha numeric string provided by the advertisers), which remains unchanged from channel to channel. However, it became apparent that some ads which viewers might well consider virtually identical had different copy numbers. Thus the copy number system would indicate that there are more different ads than might be the case if all the ads for a particular product could be compared and a judgment made about which were essentially the same. A manual sort of this kind would be a considerable task.

The results using the strict but objective criterion of where the same copy numbers appeared in the analysis shows the repetition of those ads, which included ethnic minority representation within channels and across channels.

**Table 5: Repeated ads by channel**

N times shown	1	2	3	4	5	6	7	8	9-14
	%	%	%	%	%	%	%	%	%
Within Central	36	28	16	9	5	4	2	0	0
Within Channel 4	34	21	21	10	5	9	0	0	0
Within Channel 5	43	22	16	8	7	3	0	0	2
Across channels	18	14	13	13	13	8	8	9	4

Thus, in the combined sample across the three channels, less than one in five (18%) ads with ethnic minority representation occurred only once while over one half (55%) occurred four times or more.

Examining more closely those ads that featured ethnic minority participants in major roles (N = 305) revealed that these were based on 108 unique copy numbers. Thus, on this basis, these ads were repeated 2.8 times each. However when sorted by the criterion of ads which were essentially the same, the number of unique ads reduced to 88 which translates to 3.5 repeats per ad. Thus using the copy numbers seems to produce only a modest underestimate of the extent of repetition.

## 2.11 Channel comparisons

As noted above, very few ads were unique to one channel with the majority appearing on more than one channel. Thus channel differences might be expected to be small. Table 6 below shows the details.

**Table 6: Sample details and proportion of ads with ethnic minority representation**

	Central	Channel 4	Channel 5
Total ads	1840	1899	1852
Total codable	1564	1681	1654
Total non white	446	489	488
Total with ethnic minority	426	443	452
With eth min (%)	27 (27.2)	26 (26.4)	27 (27.3)

All three channels contained quite similar proportions of ads with ethnic minority representation ranging from 26% to 27%.



Table 7 examines the proportion of the population which ethnic minorities represent within each channel's ads.

**Table 7: Sample details of population in ads**

	Central	Channel 4	Channel 5
Total population	7295	8424	9193
Total non white	1002 (= 14%)	1392 (= 17%)	1511 (=17%)
Total ethnic minority	901	1168	1208
Ethnic minority %	12 (12.4)	14 (13.9)	13 (13.1)

In all cases these proportions are very much higher than observed in the programme output analysed in the 2001 BSC samples. The comparative figures are given in Table 8 below.

**Table 8: Ethnic minority population in programmes and ads by channel**

Channel	Programmes %	Ads %	Actual Difference %	% Difference Progs:Ads
Central	6.7	12.4	+5.7	+85%
Channel 4	10.0	13.9	+3.9	+39%
Channel 5	9.8	13.1	+3.3	+34%

## 2.12 Ethnicity by age and gender

The most obvious pattern in the ages is that the ethnic minority participants are far more clustered in the younger age bands. Thus almost half (46%) of the base sample males are in the 30+ age band compared with almost half this amount (25%) of ethnic minority males. A similar result is seen with women where in the base sample almost a third (30%) are 30+ compared with only 19% of ethnic minority females. See Table 9.

**Table 9: Age distribution of ethnic minorities versus white base**

	Black		Asian		Other		All eth min		White	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
	%	%	%	%	%	%	%	%	%	%
1 to 15	22	19	12	13	25	4	20	16	22	20
16 to 21	11	17	18	23	10	21	12	18	7	10
22 to 29	46	49	34	29	41	60	44	47	25	40
30 to 39	17	10	18	14	14	11	17	11	23	18
40 to 49	4	3	12	16	5	2	5	5	12	7
50 to 59	*	1	7	--	4	1	2	1	7	3
60 plus	1	2	--	4	1	2	1	2	4	2
Total	101	101	101	99	100	101	101	100	100	100

Similarly just under one third (32%) of males in the base sample fall into the 16 – 29 age band compared with well over half (56%) of ethnic minority males. This relatively youthful pattern is most pronounced among Black participants. Indeed, Asian people while numerically very small, have almost one third of their male and female participants clustered in the 30 – 49 age bands.

## 2.13 Ethnicity by role portrayal

Separately from the overall tone of the ad, participants were categorised according to whether their role portrayal was essentially serious, light or comic. Here, as Table 10 shows, the differences between the groups were relatively small. Overall, ethnic minorities were somewhat less likely to enjoy a comic role than their white base counterparts while Asian participants were more likely to be cast in a light role than any of the other groups.

**Table 10: Role portrayal by ethnic group (ethnic minorities)**

	Black	Asian	Other	Total	White
	%	%	%	%	%
Comic	7	8	7	7	11
Light	37	43	38	38	34
Serious	57	48	55	55	56
Total	101	99	100	100	101

Guy Cumberbatch and Sally Gauntlett

With the assistance of Hazel Collie, Victoria Littlejohns, Alan Bournes, Jean Woods, Jane Nweze, Paule Mercier and Toni Mayner.

Analysis produced by The Communications Research Group.

### **3. Representation of ethnic minorities in print advertising**

Analysis produced by MA students at Leeds University Business School.

Sample of national newspaper, supplements and consumer magazines produced 874 ads featuring 2195 individuals.

In keeping with TV analysis, individuals were graded according to their position within the copy.

Group	Sole/Major		Dominant		Minor		Background		Total	
	Number	%	Number	%	Number	%	Number	%	Number	%
Asian	3	6	23	44	9	17	17	33	52	100
Black	17	16	38	36	34	32	16	15	105	100
Other	-	-	-	-	-	-	32	100	32	100
White	377	19	584	29	603	30	442	22	2006	100
Total	397	18	645	29	646	29	507	23	2195	100





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