CANADA'S ETHNIC MEDIA:

Fostering dialogue, forging the engagement and integration of new Canadians, uniting our communities in Canada's diversity and multiculturalism responsibility.

A national socio-economic report on Canada's community-based ethnic/third language media

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For:

National Ethnic Press and Media Council of Canada
Conseil National De La Presse Et Des Medias Ethniques Du Canada

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The following information is provided by Seneca College and the author with respect to this report;

"On behalf of and in cooperation with the National Ethnic Press and Media Council of Canada (NEPMCC) Seneca College was contracted by the NEPMCC to prepare the NEPMCC approved NEPMCC member survey questions and its questionnaire. NEPMCC staff administered the member survey questionnaire online to its registered members via email, fax, Canada Post, in person and by telephone interview as required by its members. The NEPMCC member responses and voluntary comments collected by NEPMCC through September 30, 2011 were submitted to and analyzed by Seneca College. The NEPMCC survey analysis and responses contained in this report represent the socioeconomic profile, opinions and views of the members of the NEPMCC who participated in the survey. The balance of content of this report represents the author's observations based on the survey results and analysis and a significant body of existing academic socioeconomic research and study, which is a body of information and statistics in the public domain, often with embedded wiki technology. This content was supported by a supplemental public poll and interviews conducted by the author. Any views or opinions expressed in this report are not necessarily the views or opinions of either Seneca College or the author of this report. Best attribution efforts have been made to correctly acknowledge and reference the material of original authors whose works offer a window to academic thought related to ethnicity and ethnic media. Seneca College and the author acknowledge the copyright of any such intellectual property. To ensure proper attribution this report has been scanned through SafeAssign™, Seneca College, a Blackboard Learning System Enterprise Client. Any release of information contained in this report is in accordance with the Personal Information Protection and Electronic Documents Act (PIPEDA), Office of the Privacy Commissioner of Canada."

FOREWORD

ETHNIC MEDIA HAS TRANSFORMED THE CANADIAN MEDIA LANDSCAPE

October 23, 2012

TD Bank Group is a proud supporter of the National Ethnic Press and Media Council of Canada (NEPMCC) and its dedicated membership of ethnic print, radio and television outlets. At TD, we truly believe that ethnic media's grassroots reach fulfills a unique function that serves to promote civic engagement and build a sense of community across Canada.

Canadian ethnic media has helped transform the media landscape providing newcomers to Canada relevant and timely information in their language of choice from a variety of perspectives for over 150 years. Ethnic media's ability to inform, report, educate and entertain Canadians has helped to showcase and preserve diversity of culture, heritage and language within the great Canadian cultural mosaic.

The NEPMCC for the past 25 years, under the leadership of Mr. Thomas Saras, has helped transform the media landscape by providing Canadian ethnic media outlets with a common voice for advocacy, assistance and cooperation helping them grow and succeed in an increasingly competitive media environment.

At TD, our support for the NEPMCC is grounded in our belief that, as an organization, our contributions to the social and economic development of communities must be enduring and compelling. We strive to make a positive impact where we do business and where our customers and employees live, work and play.

With over 85,000 employees around the world and our community giving reaching $44.5 million in Canada this year, TD is in a unique position to collaborate with the NEPMCC to harness our collective expertise and resources for greater community impact. Our belief in partnering with community organizations to help broaden public awareness aligns with our investment in the NEPMCC's National Socio-Economic Report and its dissemination across Canada.

As ethnic press continues to evolve and transform, TD hopes to engage, connect and enrich diverse local communities in meaningful, long-lasting and innovative ways.

Scott Mullin
Vice President, Community Relations
TD Bank Group

The content of this study represents the opinions of the authors and does not necessarily represent the policies or views of TD Bank Group.

NATIONAL ETHNIC PRESS & MEDIA COUNCIL OF CANADA SURVEY COMMENTS

Congratulations to the National Ethnic Press and Media Council of Canada for undertaking this important and timely study on Canada's community-based ethnic/third language media.

This study reflects the needs and problems of Canadian ethnic media as they try to integrate new immigrants into Canadian culture. It also creates an awareness of the problems and needs that various ethnic media face as they try to serve Canadians in their local communities.

This study should serve as a basis for soliciting funds from the Government of Canada since ethnic media serve a great and important role in ethnic communities by introducing newly arrived immigrants to Canadian culture.

Respectfully,

Pandelis Halamandaris
Professor Emeritus
Brandon University

"This study provides an important snapshot of the economics that underpin ethnic news organizations and the challenges – both journalistic and financial – that many of these small businesses face as they try to fulfill important roles in their communities. Respondents voiced concerns about competition from the Internet, lack of training opportunities and the need to hold down other jobs just to keep afloat. This is not a business for the faint of heart."

April Lindgren
Associate Professor
Ryerson University School of Journalism

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Report from the President

NATIONAL ETHNIC PRESS AND MEDIA COUNCIL OF CANADA
CONSEIL NATIONAL DE LA PRESSE ET DES MEDIAS ETHNIQUES DU CANADA

Canada's Other Voices

For the nearly 40 per cent of the Canadian population whose mother tongue is neither English nor French, Canada's ethnic press and media perform a unique function within mass media. Their primary purpose, and especially through Canada's ethnic press, is to inform readers and viewers in a language more readily understood than in Canada's official languages, and by doing so provide a gateway to understanding and becoming Canadian. By serving Canada's various ethnic communities our ethnic press and media fulfill a role which goes beyond serving the internal needs of immigrant communities.

For more than 11 decades Canada's ethnic newspapers have been meeting the needs of assistance, guidance and integration of millions of newcomers who have immigrated to Canada from many lands. They perform this role in full awareness of and with a great sense of duty and responsibility to Canada, which is defined by many cultural and linguistic communities.

In addition to providing important news, Canada's ethnic press and media provide key information about settlement issues, community and official languages learning programs, and health, immigration and work policies and services. They introduce new Canadians to our democratic institutions and a new way of living in a new country. To these new Canadians who, at one time or another, may have found themselves restricted by language barriers in a country whose laws, traditions and customs were different from their own, Canada's ethnic press act as a guide, interpreter, teacher and as an intimate and trusted friend.

By introducing members of immigrant communities to new community environments and Canada's socioeconomic system as efficiently and as painlessly as possible, Canada's ethnic press equally serve individuals, families, all communities and all stakeholders. By fulfilling this role Canada's ethnic press helps newcomers to become full-fledged Canadian citizens, ready, willing and able to contribute their talents and abilities for the benefit of all Canadians.

Classical democratic theory always viewed democracy as a set of institutions, which both promoted and depended on the full rational development of the individual. Canada is a nation of many nationalities, many races, many religions and many languages, bound together by a single unity, the unity of freedom, tolerance and equality. In support of the Canadian Charter of Rights and Freedoms it is crucial that the place of every minority group in our society not be obscured by ignorance, prejudice or racism. It is important that the members of every community have the ability to discuss and consider among themselves their special problems, so that these problems may find expression for the benefit of our broader society. Here, access to language is also central to preserving Canada's multiculturalism and diversity.

The ethnic press importantly ensures that our liberties, our democratic way of life, our freely elected representative government make it possible for us to participate, agree or disagree among ourselves in our language of choice over ideas and institutions without bitterness or misunderstanding. Through access to a common language is the fundamental truth that linguistic groups, which were divided abroad, are united here in Canada.

Globalization and other forces today are changing many traditional parameters in the way that government is exercised and how society views itself. Because of these developments it is important to acknowledge that Canada's ethnic press demonstrates a high level of education and competence to meet the ethical and social responsibilities of such change. In the reality of the socioeconomic challenges that Canada's ethnic press face daily we must support our ethnic press and media as they are serving Canada, they are helping new immigrants to understand and integrate as quickly as possible into mainstream society to be productive citizens in the broadest sense of Canadian community.

Canada today is in a period of socioeconomic change in a world that is becoming smaller and smaller, looking for new markets and searching for new partnerships. In this context the ethnic press and the ethnic communities it serves is an important participant in both process and progress.

This reality underlines the importance of this survey and the fact that we need to know the problems and the needs of the members of Canada's ethnic press as it is our democratic public responsibility to provide them with tools through education and financial assistance in order to make sure that the information they provide is accurate, complete and consistently accessible and not limited by economic factors. This is the first and only survey of its kind ever conducted at a national level in Canada, a fact that makes this survey very important.

The members of the National Ethnic Press and Media Council of Canada express gratitude to Seneca College and to Angela Zigras and professor Dr. Gabriel Huston for their hard work, enthusiasm, consultation and help provided in order to complete the NEPMCC survey process to the best of our ability as expressed in this report in order to help improve the futures of the members of the ethnic media sector and the communities which it serves. Our thanks and gratitude is also expressed to the Department of Canadian Heritage, the Canada Periodical Fund, and TD Bank Group for the financial assistance they provided toward the successful completion of the NEPMCC survey.

Thomas S. Saras
President and CEO
NATIONAL ETHNIC PRESS AND MEDIA COUNCIL OF CANADA
CONSEIL NATIONAL DE LA PRESSE ET DES MEDIA ETHNIQUES DU CANADA

Executive Summary

Companies that own and/or operate community-based ethnic (third language) media enterprises in Canada fall into two main categories, each with unique attributes, business, economic, strategic and sustainability needs profiles in the better service of their communities.

These two categories are:

- Small to medium media enterprises, which represent the majority of independent ‘owner/operator’ and ‘family partnership’ which fall into a polarized organizational structure. This group represents the majority of Canada’s ethnic media businesses serving the broadest representation of Canada’s multicultural and third language diversity. Within this group we observe the widest range and depth of multiple needs and hurdles with a common core value to ‘better serve our communities’.

- Large media enterprises which are mostly commercial and often commodities and transactional in their mission, structure and outlook. This group represents highly focused needs to better serve large, urban immigrant communities and demonstrate strong economic capability, competence and strength to identify and capitalize on new markets, services and opportunities to identify, capture and hold their major audiences.

Together, these two ethnic media categories effectively reach Canada’s ethnic communities and speak to Canada’s immigrant and visible minorities, which, according to Statistics Canada will be one out of every five Canadians by 2017, with highest concentrations in the urban centres of Toronto, Vancouver and Montréal respectively.
Seneca College was contracted by the National Ethnic Press and Media Council of Canada (NEPMCC) to prepare the survey questions and cooperated with the NEPMCC across the survey process through the analysis of findings toward the writing of this report.

Several key NEPMCC Survey questions related to the socio-economic of Canada’s ethnic media industry reveal blind spots, gaps and statements of need (cries for help) to be better able to serve the community spectrum of Canada’s ethnic diversity, particularly within the small to medium size ethnic media enterprise category.

The key questions and findings interpreted from the NEPMCC survey include:

What is the predominant organizational model? What kinds of ownership?

The predominant organizational model for the majority of NEPMCC survey respondents is as 'independent owner/operator'. This organizational form demonstrates large variances between traditional organizational functional activities or 'operational matrix columns' such as administration, finance, marketing, production, research and sales, against horizontal 'organizational matrix rows', which are the core business activities or product areas that the business derives its income and profit from. The main reason for such variances is the multiple focus and time demand imposed on management to simply keep the organization afloat and running.

It is also observed that many NEPMCC members also have day jobs in addition to their ethnic media enterprise management and operational responsibilities. They must work from two perspectives, often balancing different skill sets and unstable resources to manage dual responsibilities to stay current and succeed. This dual orientation and responsibility means that their effectiveness is often imbalanced and they cannot function optimally as effective managers.

Another observation is that small to medium size third language media operators encounter difficulty in attracting and retaining staff to develop human capital and management potential. This negatively impacts effective organizational growth planning with the result that staff see their jobs in small to medium ethnic media companies as a first step to a career with a larger media organization. This makes it difficult for small to medium size ethnic media operators to build team presence, dynamics and commitment within their organizations.

This reality does not provide the necessary organizational climate for adaptability, innovation and change that is required to succeed in the challenges of the emerging third language media industry. Large, 'fast growth' third language commercial media operators may view small to medium size third language media operators as acquisition targets and are perceived by small to medium sized operators as a threat to their ability to profitably compete for necessary advertising dollars and representative 'space' in Canada's third language media market presence.

A team-based network of interaction with a learning-oriented business-to-business approach is needed to meet the challenges of the local environment, hedge against polarization between small to medium size and large ethnic media enterprise operators and identify growth opportunities that uniquely emerge from balanced and open industry collaboration.

Where smaller third language ethnic media operators encounter further complexity and threat to organizational integrity is through the sub-contracting of key functions, which is reported in the member data.

Following are some of the elements that prevent effective organizational development and innovation within Canada's third language media industry at the small to medium size organizational level:

- Problems cited more than solutions;
- Organizational advancement and innovation are associated with a high price tag and additional demand on already over-stressed owner/operators;
- This type of organization is an excellent apprenticeship and learning ground for media and community/social diversity training, but there is absence of support, direction and mechanisms for continuous professional development and improvement;
- Innovation is difficult because the point of business focus is survival. As a result, the dynamic of change has little chance of being implemented;
- Multiple approaches are difficult to model because of the absence of an industry structure that funds and supports new organizational and business modeling incubator, while representing cultural diversity organizational diversity is threatened;
- Team building for profitable growth and partnering across the industry through collaboration initiatives are overshadowed by perceived operational difficulties.
- The development of hard and soft business, creative, journalistic, professional and strategic and sustainability management skills is difficult;
- Fear of risk-taking because of financial limitations is a common entry barrier to growth and diversification;
- Creativity, invention and new leadership opportunities are limited because of staff retention issues; and
- Curiosity is suppressed by the need to focus on operational challenges.

What are the main challenges and hurdles that ethnic media editors encounter from an economic perspective?

From an economic perspective the main challenges that ethnic media editors face include the lack of financial and human capital resources to build editorial team strength to fully access and serve the communities and groups that they represent; be it reporting on key community discussion, events and issues, or interfacing with mainstream national and global media to fully develop and advance editorial perspectives on the issues that affect their communities. As such, editorial interactivity is limited by the financial and human capital resources of the small to medium size ethnic media companies and in many ways is outweighed by the mainstreaming of broad editorial themes by large ethnic media organizations.

Additionally, with many ethnic media editors holding full time jobs because of economic necessity, barriers are presented to having free access to relevant press conferences that would enrich the quality and diversity of their editorial content.

How many and what type of jobs do ethnic media create?

More comprehensive research will be required to accurately determine how many jobs ethnic media create nationally. It is important to acknowledge that the diverse types of jobs that ethnic media creates positively contribute to Canada's economic growth through emerging consumer audiences with powerful disposable income and in the following areas/ways:

- In the printing industry supply chain and its related delivery mechanisms;
- In radio and television industry viability at both the large commercial enterprise level and through buying blocks of otherwise marginal income air-time by smaller ethnic outlets that revitalize that airtime to reach new audiences;
- Stimulating the businesses of the advertisers who rely on ethnic media to drive sales to ethnic markets and thus generate new jobs for third language speaking labor forces; and
- As a ground level enterprise, employment and skills development opportunity for talented immigrants whose skills would otherwise be under-utilized in other forms of work.

What is the educational background of the publishers and editors of ethnic media?

The majority of the publishers and editors of Canada's ethnic media outlets are educated to the higher level with over two thirds having attained a university degree or higher. They represent a community-minded, intellectual, mature body of professionals who contribute significantly to the rich diversity of Canada's media landscape.

What are the links between ethnic media outlets and the communities they serve?

The links between ethnic media outlets and the communities they serve are a multi-dimensional interwoven tapestry truly representative of Canadian community, national, transnational and global communication, culture, diversity and society, and cannot be viewed in a linear fashion. The links and the communities they serve include, among others:

- Canadian ethnic media outlets directly with Canadian local communities;
- Canadian ethnic media outlets directly with Canadian regional and national communities;
- Canadian ethnic media outlets directly and indirectly with international communities,
- Canadian ethnic media outlets with mainstream media;
- Canadian ethnic media outlets with government and community service agencies;
- Canadian ethnic media outlets with each other through NEPMCC;
- Canadian transnational ethnic media outlets internally with affiliate/parent media outlets; and

- Canadian and Canadian transnational media outlets globally across wire services (Associated Press, Reuters), the Internet and social media.

How does the economic factor influence the quality of the content and how does this impact the market in which they operate?

There is clear and ample demonstration that the economic factor significantly influences the quality of content across Canada's third language media and both the existing and potential markets in which they operate. Key influencing factors include access to capital and government support for entry, solvency, sustainability and growth of small to medium size ethnic media outlet operators, free vs. paid media, community/public service vs. commercial balance, economic scales of efficiency and maintaining balanced presence with both mainstream and emerging commoditized ethnic media operators. These influencing economic factors coupled with the imperative to identify and secure predictable streams of advertising revenue from advertising agencies by providing reliable audience research and data and the need to compete with mainstream media for available advertising budgets impact the market in the following ways:

- New categories of market entry opportunity such as ethnic marketing to supplement traditional media offerings and develop better research tools to determine the quality and direction of content;
- Restricted market presence and narrow distribution channels sets entry barriers for small to medium size outlets to finance content quality improvement;
- Need to focus on securing local advertisers for small to medium size outlets with restricted quantity and quantity of content;
- Limited ability of both small to medium size and large outlets to attract specific interest groups such as youth who perceive ethnic media in general to be too focused on older generations; and
- Restricted markets and cross-cultural market interface mean costly and/or limited access to national opportunities and broader dialogue for more expanded, quality content.

Their collective voice is clear - forge a unified direction for sustainable business opportunity and growth, professional training in business and strategic management and professional skills development related to journalism; create unified media and audience measurement and research tools; open business opportunities through new communication technologies; assist our small to medium size members to minimalize business risks and promote deeper interactivity with Canada's formative immigrant communities.

A review of the history and evolution of ethnic media in Canada and today's forces of diaspora, globalization and immigration are described in this report. These forces shape the nature, direction and future of ethnic media in Canada.

An overview of leading thought and research related to ethnicity, ethnic media, immigration, media evolution and socio-economic indicators offer a snapshot of the diversity environment in which Canada's ethnic media industry seeks economic sustainability in improved community-based service, particularly in helping new Canadians to settle and integrate.

One of the first challenges in understanding Canada's ethnic media industry was to correctly position the concept of ethnicity and ethnic media and its varied interpretations in line with the rise of Canada's 'visible minorities' to their established position as mainstream consumers, an emerging population that is redefining Canadian culture, identity and society. It is important to communicate that the terms describing ethnic media are often used interchangeably and it is often difficult to trace the origin and/or precise meaning of certain terms as they may have different meanings adapted and related to locality, country or region of usage, that it is immigration, migration, societal change and local sensitivities that shape their origin, meaning and popularization.
An example is that the terms community media, ethnic media, geo-ethnic media, intercultural media, multicultural media and third language media have been all used to refer to the generic term ethnic media, yet each reflects a particular development in sociocultural thinking arising most notably from local or regional study by social scientists and the cultural sensitivities of local populations.

In this report Canada's ethnic media are referred to as third language media, placing our ethnic media on a level playing field with Canada's mainstream media in our two official languages, English and French.

This report establishes and discusses from multiple perspectives the central role that Canada's third language media uniquely fulfil in promoting Canadian intercultural diversity, dialogue, heritage, community and civic engagement. This role is central to both Canada's ethnic media industry and Canada's socioeconomic progress.

Emerging trends are documented focusing on the pressures upon and the marginalization of Canada's third language media from without and from within; the commoditization and globalization of dominant third language Asian markets, and the 'we' vs. 'they' attitudes that linger to delineate third language media from the 'mainstream' in the new reality that Canada's third language media are an emerging mainstream. The link between geography and ethnicity is documented as is the necessity for a more proactive ongoing national approach to third language media and social research for best practices and continuous improvement.

As a supplement to the results of the NEPMCC Survey an independent community poll on Canadian third language media was conducted in the GTA and surrounding area during December 2011 and leader views were received as a SWOT analysis concerning Canada's third language media. This limited public opinion demonstrates strong support of Canada's third language media as a major component of Canadian life, culture and community.

From the NEPMCC survey four critical areas of need are identified to foster a vibrant, balanced, economically sustainable third language community-based media industry in Canada.They are:

- Canadian media industry-wide discussion, collaboration and synergy with Canada's community based third language media industry;
- Increased public sector interface and government support;
- An array of professional skills development, research tools and strategic management assistance for the third language media industry; and
- Identification of and equal access to innovative products, markets and partnership opportunities for stability and sustained growth.

While this report is positioned and presented as a general overview containing specific survey results from a limited representative sample of NEPMCC members from a socioeconomic community-based perspective, it is national, current, timely, and its recommendations are well positioned to stimulate thought, discussion and proactive engagement in the fast paced global communication, intercultural and societal realities that Canada's third language media industry is a dynamic, integral, interactive and formative part of.

Across this offering of a tapestry of perspectives in new Canadian realities three words are pivotal to further discussion related to third language media.
They are community, help and now.

Introduction and Overview

Statement

All life needs communication to survive. From colliding protons at the cellular level through communication between individuals and across societies, reflecting back through self, group, community, national and global identity, all life truly is interconnected.

Canada's ethnic media industry is a vital national communication link, one that is at risk of being marginalized yet possesses great potential to dynamically evolve to create new space in the global tapestry of human diaspora and the formation of new Canadian communication highways in our age of media convergence and emergence through new information and communication technologies.

In this report Canada's ethnic media tapestry is overviewed from both national and global perspectives. Its pivotal role in cultural, political and social research is defined and recognized as a central pillar in Canada`s communication ecology, identity and development infrastructure for better opportunities based on community life and public engagement.

Through this report Canada's ethnic media is seen in the context of culture, globalization, current research, and emerging trends that recognize Canada's ethnic media as our distinctively Canadian third language media, an emerging mainstream media and touch-point of how Canada and being Canadian is perceived within Canada and around the world.

While this report makes recommendations across those areas of most urgent need to support a dedicated climate of growth for Canada's third language media, it is at the same time a clarion call for Canada to create a world class centre of diversity excellence in communication where third language media education, professional skills development and research can find a home in the advancement of Canada's communication and socio-cultural innovation 'know-how'.

In his 1964 book Understanding Media: The Extensions of Man Marshall McLuhan coined the phrase “The medium is the message.”, proposing that it is the medium before its content that should be a focus of communication study, that a medium affects society through both the content delivered across and by the characteristics of the medium. To elaborate, McLuhan used the analogy of the light bulb as a medium without content and stated “a light bulb creates an environment by its mere presence.” (Em)power it and there is illumination.

It is the vital presence of and accessibility to third language media in the Canadian communication landscape that is the message, setting a “cascade of interactions” in our evolving intercultural self-identity and provides a platform for discussion, interactivity and engagement. Similarly it is the forum that Canada’s third language media presents that gives shape, structure and substance to our public attitudes, norms, values and social implications.

Background

Across the summer of 2011 and concluding on September 30, 2011 members of the National Ethnic Press and Media Council of Canada were surveyed about their business challenges from the perspectives of current business operating platforms, content and distribution and audience base.

The members surveyed were also asked to consider and respond to top-of mind challenges and solutions, prompted internal and external issues and expected changes in Canada’s ethnic (third language) media in the next three years.

Members expressed concern for the future of their industry, ongoing government involvement and support and competition from ‘mainstream’ media’. The members demonstrated split opinions concerning changing demographics and Internet opportunities and obstacles.

The NEPMCC Survey lead to several recommendations including providing members with training in business management, marketing, creative problem-solving, leadership and succession planning, creating synergy with other members, ways to attract new and young adult audiences and the need for government to ‘fill the gaps’. As one member described Canada’s ethnic (third language) media, we are ‘the voice of Canada’.

The NEPMCC Survey results prompted thought on the challenges that Canada’s third language media face in our globalizing world. Discussion with media industry leaders and a poll of the general public’s third language media habits were independently undertaken by the author to offer additional viewpoints which are detailed in this report.

Learning Tree Approach

This report takes a learning tree approach to the subject of ethnicity in Canada and establishes Canada's third language media industry's importance to Canadian culture, heritage and identity and establishes the need for comprehensive, ongoing national research and study of Canada's third language media from a socioeconomic perspective.

The intercultural communication tapestry presented in this report positions Canada's third language media as way to understand and further study Canada as a communication nation empowered by diversity.

As varied and complex as the study of ethnicity and diversity is, it is the concept of a healthy thriving communication learning tree that is the communication message of this report. Canada's third language media industry must be viewed organically within Canada's functioning communication universe, not as a branch or aspect of Canadian media.

In the spirit of the learning tree approach the NEPMCC Survey necessarily lead to community discussion and media leader interviews throughout December 2011 to frame this report in broader terms relating to ethnicity in Canada, heritage, immigration, settling and community development, community integrity and economic viability.

Content of Concepts

The word 'ethnic' has complex, often varying meanings. In general terms, an 'ethnic group' is a 'group of people whose members' self-identify and same group-identify through some or all of a common culture, heritage, homeland, language and traditions'. This self and same group identification may or may not include a shared faith and/or a common ancestry. Common social characteristics of an ethnic group may often include a sense of belonging to that group and recognition from others of the group's unique characteristics.

The modern use of the term 'ethnic group' emerged with the popularization of the social sciences as a way to study and understand national and group identities and populations in the face of the broad movement of people and cultures that began with industrialization. The terms 'ethnic' and 'ethnic group' and have often been applied to immigrants and incorrectly to First Nations people, often with prejudicial and racial overtones in self-protectionism of a perceived national identity by a cultural mainstream in the throes of social change or a threatened 'norm' because of the presence, visibility and voice of minorities within a cultural mainstream.

Of note is how visible minorities often reference themselves within the concept of a national identity, using ethnic group identity before national identity as a way to distinguish and value ethnic identity within a national identity. Examples of this include ‘Italian-Canadian’, ‘Afro-American’, or any possible combination where the ethnic group identification precedes national identification.

This observation is particularly important when discussing ethnicity and the ethnic media in Canada because of Canada’s strong historical and current patterns of migration, immigration and settlement from many distinctive ethnic groups to form our great nation that self-identifies and defines itself as a pluralistic tapestry of cultures, as opposed to being a ‘melting pot’ in nationhood.

In Canada today, with such great cultural diversity in evidence largely driven by immigration, it is proposed that the study of ethnicity as it relates to ethnic media must be approached from the perspective of an interrelated communication whole within a national social identity based on language and representative populations.

In Canada major Asian media serving pan-Asian Canadian audiences necessarily appeal to their audiences through the most common language(s) in usage. However, it is the presence of small to medium third language publications published in any number of languages and dialects that serve in a more meaningful way to preserve cultural diversity and community dialogue in the face of dominant regional third language media presences in Canada.

What is important to the purpose and understanding of third language media in Canada is the vitality and voice of ethnic inter-group interactions through the forms of communication that Canada’s third language media industry uniquely presents as a distinctively Canadian cultural communication universe in dynamic global intercultural evolution.

Kim, Jung and Ball-Rokeach in 2006 observed that ethnicity and geography clearly affect and are affected by each other. They termed this relationship as ‘geo-ethnicity’, meaning that no two communities can be assumed to be the same, even if they seem appear to be similar. Geo-ethnicity is a symbiotic relationship and it is the dynamic interaction between geography and ethnicity that is central to understanding the experiences of ethnic groups and new Canadians, and in this report the vital role in communication that Canada’s third language media industry fulfils.

Third language media in Canada reflect the multi-faceted complexity of the daily lives of their target audiences and society in general, both within Canada and internationally. From relating news and events from a native homeland where the media may be censored or supressed, to relating new Canadians’ experiences and preserving shared values through settlement and community formation. Canada’s third language media extends beyond culture and ethnic identity to communicate what it is to be a Canadian, and in doing so assist Canada to define Canadian culture and govern its sovereignty.

Hofstede (1984) observed that ‘culture is learned, shared and guides members of a society to solve every day problems’. From this perspective the content, context, shape and texture of third language media in Canada can play a vital role in identifying problems at a grass-roots level and assist to discuss and develop societal problem-solving competency.

If the differences and common characteristics between Canada’s cultures can be documented, observed and compared through the tapestry that Canadian third language media represent, we can better appreciate the symbiotic nature of Canada’s third language media within the totality of Canadian society.

Hofstede (2001) says that culture resembles an iceberg. Using Hofstede’s concept of the cultural iceberg, consider that an iceberg is not static. It is contained by and moves in a current, its shape and direction both above and below the waterline being constantly redefined where in fact the iceberg contributes to that which contains it. Such is the nature of culture. It is a dynamic flux and its study must be a study in movement, interaction and constant change. Here, particularly third language media can effectively serve as a barometer to measure the cultural aspects of that constant change.

In this reality, recent studies on third language media in Canada which primarily focus on Canada’s metropolitan areas must be appreciated within the context of dynamic flux. Certainly the results and analysis of the data that will emerge from Canada’s 2011 census will assist greatly to validate and update assumptions.

Further, if the study of third language media in Canada can be compared to a portion of the 10 per cent of the cultural iceberg that is visible and measurable above the water line, the 90 per cent below the water line represents the significant cultural and social dynamics that shape Canada’s communities, economy, national identity, legal system, politics and our future as a nation.

Strategic cultural influencers below the water line include the forces of globalization of all media via the Internet, youth fascination with popular culture and the rapid emergence of new communication technologies and their influences on culture to name a few.

Turner (1982) defined three dimensions of ‘ethnic identity’; self-identification as a member of a particular ethnic group, knowledge of the ethnic culture, and feelings about the behaviors that demonstrate belonging to the ethnic group.

Canada’s ethnic tapestry reinforces that these dimensions are constantly shifting. For example, a Canadian youth may self-identify as being ethnic but her/his ‘pop culture’ enculturation may not include a profound understanding of the beliefs, norms and traditions of an ethnic background or fluency in a third language. Further, a child of mixed ethnicity may choose to self-identify with one background, and a child that demonstrates little knowledge of her/his ethnic culture may have strong feelings of belonging to an ethnic group.

The point of these illustrations is that ethnic identity is a fluid state and fostering a communication climate that embraces intercultural fluidity of identity is a function that Canada's third language media uniquely fulfil.

Accessibility to a broad and vibrant tapestry of third language communication promotes the understanding of both self and group identification within the contexts of community formation and engagement, ethnicity, heritage preservation, intercultural understanding and societal evolution.

Current Canadian social researchers, including Lindgren, have observed that Canada is the world's most ethnically diverse nation. Their work competently illustrates how Canada's communities are defined by regional and most notably complex urban identity. How people evolve their ethnic identity through everyday life in Canada is in part influenced by available communication options, access to local communities and exposure to people who speak a different language.

From the perspective of the Canadian immigrant, a newcomer to Canada living in a large metropolitan center with a significant resident population from a similar background and access to broad ethnic media exposure may self-identify, settle and integrate into community in a different manner than the same person who settles in an isolated Canadian community. Their ethnic identities will evolve and re-define, but not necessarily in similar ways.

Through language an immigrating culture develops and evolves their Canadian ethnic identity, voice and the process of social and community involvement through everyday life and daily interaction in Canada. The common ground and forum for dialogue and exchange between the new immigrant and Canadian society may often be via joint access to and communication through and across third language media.

Through open dialogue and exchange societies can minimalize the risks associated with making false assumptions about cultural and social differences, or the biases that arise from any feelings of cultural superiority or inferiority.

By promoting open dialogue and exchange, Canada's third language media truly serve as champions of a "just society". Through Canada's third language media society gains access to space for participation, involvement and evolution through open communication in the broadest possible sense. It is this open climate that supports diversity from a grass-roots level up, and can manage the risks of possible social imbalances.

Research for Best Practices

Through social scientists we observe, measure and describe the intricacy of the evolving human cultural tapestry. This report acknowledges the need for best practices in social research but places equal emphasis on simply understanding the dynamic flux of social perceptions about ethnic identity that is difficult to measure and define in pure research terms. Put simply it is those common values that groups seek to share that promotes understanding and evolution of both ethnic identity and society.

Rather than creating new definitions of ethnicity through communication, Canada's third language media industry is presented as an essential barometer and primary lens through which researchers can effectively engage in their study of Canadian culture and society. To do so Canada's third language media industry must function effectively, ethically, professionally, profitably and sustainably.

By supporting best practices in Canada's third language media industry Canada can gain strategic communications and social research advantage by the exchange of perspectives. Proactive promotion of this climate is necessary for Canada's intercultural and societal evolutionary process.

Welcome

Dear Friends and Fellow Canadians:

When Angela Zigras, Academic Chair School of International Business at Seneca College, suggested that I write this report on the social and economic dynamics of Canada's ethnic media resulting from a survey of the members of the National Ethnic Press and Media Council of Canada (NEPMCC), I was at once honoured, humbled and frankly terrified.

I was honoured, because this report is Canada's first truly national study of our vibrant third language media. Coming from a multiple ethnic background both by birth and from inclusion, I was humbled to write this report because it means so very much to my families. They taught me to embrace diversity and to view ethnicity as being the warp and weft of human tapestry - a beautiful learning tree. I was terrified to write this report not because it is a first national report and I am the one that is writing it, but because I don't want to fall short on any possible expectations.

We all are indebted to our third language media operators who sacrifice daily to make meaningful communication access and intercultural dialogue possible for their communities and for all Canadians. Simply, my intent through this report is to open a window of opportunity for national discussion on our third language media.

Through meeting Mr. Thomas Saras, NEPMCC's President & CEO, I immediately came to appreciate his deep commitment and life-long dedication to Canada's third language media and ethnic communities that finds their roots in over 150 years of ethnic media legacy that welcomes those who come to Canada to make a new life, and in doing so, preserve culture, heritage and language while being the driving catalyst in the formation and evolution of Canadian multiculturalism, diversity, economy, heritage and society.
From my investigations I learned that ethnicity and ethnic media are closely related to community, geography and story-telling - thank you Sandra Ball-Rokeach.

My personal chapter relating to ethnic media in Canada starts with a family, my family. My late father Yousef (Joe) was born in the 1920s in rural Stead, Manitoba. The youngest of 11 children from immigrant Austrian and Russian parents they were literally dirt poor. Their first home was constructed from clumps of prairie sod and they cultivated sugar beets, directing their profit from that back-breaking work to repay their passage to Canada, and earn a new life as proud Canadians.

Like many other immigrant families who settled in rural Western Canada in the early 1900s there were few schools, and those that did exist operated from churches and were run by those family members who could read and write. Few books were available and textbooks rare. Ethnic newspapers from Winnipeg were used as elementary primers. Story-telling kept homeland memories and cultural heritage burning bright. There were no blackboards. You just had to remember things and keep hope and tradition alive by the repeated telling of those beloved stories. And when a community was fortunate enough to have the gift of an ethnic newspaper it was treasured and passed from family to family, regardless of its language or date of publication.

The ethnic press was their window to Canada and the world amid bitterly cold winters and isolation. With 11 children sharing two pair of winter boots there was little opportunity to walk three frozen miles to attend school when it was open, so the children learned German, Polish, Ukrainian, Russian and Yiddish at home, then English, largely by translating government farming and settlement pamphlets when available in Ukrainian, then placed alongside the corresponding English publication.

My mother's family immigrated to Toronto in the 1930s from Denmark. The children were not allowed to speak Danish at home until they mastered the English language. H.J. Tygesen, 'the grand old man of Canadian art', my grandfather, promoted the careers and works of Canada's Group of Seven, the central pillar of Canada's artistic heritage and legacy. Being avid multilingual readers and heated debaters my maternal grandfather and grandmother taught my mother and uncles to shape their minds and views from many different news sources.

They made arrangements for Britnell's Bookstore which was next door to 'L'estampe Moderne', the family art gallery, to bring in 'foreign language' newspapers and magazines, which were translated into English and publicly discussed at Sunday afternoon gatherings in the family gallery. Here, anyone who was interested could learn about art, culture, fashion, finance, politics, thought and what was going on around the world.

Growing up in Toronto in the 1950s, my dad, who was a railroader, and travelled between Montréal and Winnipeg, would take me with him to places like Moosonee in Northern Ontario on 'special trips'. He would bring bundles of newspapers in Ukrainian and French-Canadian to share with his friends, mostly migrant miners, prospectors and lumbermen. Closing my eyes I can see them waiting on the station platform looking for 'Joe and his bundle of newspapers', like they were made out of the very gold that they were digging in the earth for.

On Saturdays at home I fondly remember rushing to the local drug store with a shoe box containing precious radio tubes wrapped in the pink pages of the then Toronto Telegram to be tested on the radio and TV tube testing machine which looked like it came straight from a 1950s sci-fi movie. Dodging potholes I would peddle my bike like crazy back home, shoebox bouncing in my newspaper carrier, and the new radio tubes tucked safely under my t-shirt.

Dad would carefully insert the new tubes into his short wave radio, power it up, fiddle with the dial, press his ear to the speaker and listen intently for the scratchy sounds of radio programming in Ukrainian from Winnipeg, or in French from Québec.

Joe was a man who rarely smiled, but on those occasions he smiled down to his soul. Jumping forward to the next chapter of my story leading to this report, today I teach and mostly learn much from international students at Seneca College. I experience first-hand how profoundly important third language media are to them. For many of our international students this is their first time away from their families and homeland. They are alone in Canada. Through Canadian third language media they find a sense of belonging leading to community.

By some twist of fate I recently became the adoptive father of five fine Bataknese Indonesian young people; Cynthia, Baringin, Binsar, Pandapotan and Pahala Manurung. The Manurung family who live in Jakarta, Medan, North Sumatra and Dolok Nagodang beside Lake Toba, the site of the world's last super-volcano, entrusted the well-being of their children into my care and have in truth embraced me as their own, legally, as Batak, Sumatra's Aboriginal people.

Cynthia, a graduate from Niagara College with top honours is now studying electrical engineering in the degree program at Lakehead University in Thunder Bay, Ontario. In the near future she hopefully will be part of a team that assures reliable power delivery in Ontario. Currently being the only Indonesian student studying at Lakehead University, apart from communication with our family Cynthia's primary source of current information about Indonesia is through online third language media.

In a similar manner, Pahala, who is finishing his studies in international business in Toronto is deeply committed to humanitarianism, particularly for Batak people in Canada, Sumatra and world-wide. In the preservation of Batak aboriginal culture, which is threatened in the modern world, Pahala relies on third language media in Bahasa Indonesia (Indonesia's national language) and in Bataknese from multiple third language media outlets to compare and contrast divergent editorial opinions and keep Batak culture alive, especially in Canada.

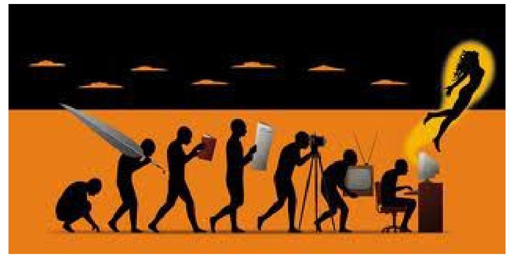
Do the Batak people who have immigrated to Canada have their own Canadian third language media outlet to share in Canada's cultural tapestry? No, but they will, and it will probably be a dedicated Canadian Batak who will start and sustain the outlet from hard-earned personal savings because they believe that Batak culture and stories are part of being Canadian.

So where does my chapter in this story of third language media in Canada end? It ends with the beginning, and that beginning is you, the readers of this report to which it is humbly dedicated in the truth that Canada's ethnic / third language media are vital in helping new Canadians integrate and grow strong roots in our socioeconomic tapestry.

To the members of the National Ethnic Press and Media Council of Canada and Thomas Saras, thank you for this opportunity to relate your realities reflected through the NEPMCC survey.

Respectfully submitted,

Dr. Gabriel Huston



The Evolution of Canada's Ethnic Media Tapestry

Through Canada's century plus tradition of ethnic media we trace our vibrant cultural and historical communication roots and come to value the importance of third language media as they dynamically evolve within a panorama of new choices and global interactivity.

Early Press Language and Culture

From the US Civil War times of black migration to Nova Scotia across the 'Underground Railroad' and the black presses of the 1850s, through the settlement of Canada by Europeans seeking a new home, immigrants to Canada have relied on printed information in their home languages to understand, adapt, integrate and maintain a sense of community and culture.

From the archives and displays of Canada's Museum of Civilization we learn that from the 1870s multicultural, multilingual publishing centre grew with the settlement of Western Canada throughout the first half of the 20-th century. Publishers in German, Russian and Ukrainian, to name a few languages, printed a wide range of advertising, cultural, informative and religious materials in addition to newspapers that provided a voice to settlers primarily from Europe. Canada's early third language press identified important public issues, presented viewpoints and communicated immigration policy and useful information related to farming, labour organization and political representation. Immigrants used the ethnic press to learn how to read in English, and with that skill immigrants were able to establish and empower themselves as Canadians.

From the early 1900s Canada aggressively sought abroad and received great waves of immigration particularly from Europe. Canada's third language press was used both as a tool for the settlement of rural areas and to foster a sense of national identity and belonging across its vast geography and settling rural and remote areas. In rural Canada in the 1920s schools were few and far between. The third language press served as the primary reader for thousands of immigrants seeking a new national identity and provided advertisers and politicians and effective way to reach new consumers and voters.

Through the 1920s and 1930s Western Canada's third language press also became a vehicle for labor union and socialist organizers to motivate and mobilize immigrants. The voice of foreign press was also present in Canada's third language publications. With the fear and suspicion associated with Russia's Bolshevik Revolution and World War I the Canadian government prohibited publications in languages which included Ukrainian and German.

The ban was lifted after World War I but for a period Ukrainian and Canadian ethnic publishers were mandated to publish their copy accompanied by a translation in either English or French.

It was the emergence of Greek-language and Italian-language urban newspapers during the 1940s and 1950s that invested Canada's third language press with a truly national sense of presence (Yes, ethnic newspapers do have a life-span. They are treasured and widely shared). From Montreal's early Italian-language newspapers, Il Cittadino Canadese, Il Corriere Italiano and Corriere Canadense, readership and demand expanded with booming Italian immigrant populations in Toronto and beyond. Where today Corriere Canadese is Canada's only daily Italian-language newspaper, behind successful third language press enterprise there is a documented historical pattern of third language newspapers and magazines that are founded by recent immigrants and either fail or are published infrequently due to financial problems and/or lack of funding.

According to the Media Awareness Network (2008) at that time there were more than 250 third language newspapers including weeklies and seven non-English dailies in Canada predominantly serving large urban areas such as Montreal, Toronto, Vancouver, and Montreal, representing more than 50 cultures and over five million Canadians who identify with a third language. Today Québec has a vibrant third language media presence, Canada's First Nations have dedicated media presence as a constant beacon to illuminate many Canadian paths of thinking in diversity and Dr. Catherine Murray's 2007 Simon Fraser University Report Cultural Diversity and Ethnic Media in BC has paved the way for Canada's media industry to embrace diversity through multiculturalism as a core Canadian value.

Today, mainland China based Chinese language global giant Ming Pao and Hong Kong based Sing Tao are Canada's and North America's largest Mandarin language daily newspapers. They are current examples of large Canadian third language press with major circulations primarily serving Toronto and Vancouver's mushrooming Asian communities and both the local and mainstream advertisers who are aggressively speaking to the buying power of these largely immigrant audiences. Balancing this commercial third language press presence are those Canadian third language publications which provide community access more closely in line with Canada's cultural policy, yet are having problems staying afloat.

Radio and Television

The advent of Canadian radio in the 1920s and television in the late 1940s as mass media provided communication options in English and French, but up to the early 1960s print communication remained Canada's dominant third language medium.

European urban immigrant concentrations in Montreal and Toronto stimulated the demand for multicultural radio in Canada. In 1959 CJRH, Richmond Hill, Ontario, followed by Oshawa's CKLB pioneered multicultural radio broadcasting in Ontario through the family dedication of Dean and Fotina Kapsalis and their "Greek Radio Program". Air-time was bought and the Kapsalis family supported their local advertisers with delicious descriptions of pastries 'fresh from the oven' to tempt listeners. CFMB began broadcasting in Montreal in 1962 primarily to Italian audiences during primetime, followed four years later with Johnny Lombardi founding CHIN radio in Toronto. However it was not until 1972 that Western Canada had its first multicultural radio station when Jan van Bruchem founded CJVB 1470 in Vancouver.

While certain major market third language audiences gained access to multicultural radio it was and remains true today that Canada's ethnic press is Canada's national third language medium, offering broadest accessibility to third language news and cultural information.

CFMT-TV, Canada's first multicultural television station serving the Toronto market was founded by Dan Iannuzzi in 1979. Under Rogers Communications ownership CFMT-TV entered mainstream multicultural television broadcasting by evolving into OMNI-1 and OMNI-2. TeleItalia, Montreal's Italian-language television broadcast service was launched in the 1980s on a shared airtime basis with other local multicultural programming. With the emergence and development of third language television programming in Canada it is important to appreciate entry was and is facilitated through shared airtime, that third language viewers also rely on print, radio and the Internet in their language of preference when their third language television programming choices are limited or off-air. Multicultural television programming milestones in Canada also include Telelatino (TLN) Toronto based television service to Latin audiences.

The growth of third language broadcast media in the 1980s was assisted by the Government of Canada amending the Broadcasting Act in 1991 to ensure that the broadcasting system would reflect Canada's racial and cultural diversity (Media Awareness Network, 2008). The Broadcasting Act (1991) clearly states that "the Canadian broadcasting system should serve the needs and interests, and reflect the circumstances and aspirations, of Canadian men, women, and children, including equal rights, the linguistic duality and multicultural and multiracial nature of Canadian society."

In 1999 the Canadian Radio and Television Commission reviewed its policy regarding how Canadian television broadcasters portray culture through their programming with the result that Canadian television broadcasters are now mandated to represent and are responsible for how they represent cultural diversity and visible minorities in their programming.

Merging Third Language and Mainstream Media

High immigration levels to Canada from Africa, Asia and the Indian sub-continent, mostly notably from the 1980s to present day, coupled with regulatory changes in the Canadian broadcasting industry and both cost-efficient and cost-effective advancements in broadcast technology and distribution opened new Canadian third language media markets, media choices and ways to access them. From expanded cable service, to satellite delivery and special interest group subscriber programming packages, to Internet television the choices and competition for third language target markets is vast and expanding in quantum leaps as new communication technologies emerge.

From the development of specific audience profiles such as Pan-Ethnic Asian (Paredes, 2001) to realizing the politico-economic importance of immigrants and third language media as the way to access Canada's changing culture and society, public and private sectors alike both partner and rival for the attention of new Canadians and those who seek to become Canadian, within and outside of Canada. One example is that Chinese government-owned Central China Television (CCTV) has ventured with Rogers Communication Inc. to provide Chinese-language specialty channels in Canada.

Digital media, globalization and immigration and settlement forces today primarily from mainland China and the Indian sub-continent shape the presence and content of third language Canadian broadcasting media. Particularly in Toronto and Vancouver the demand for programming in Mandarin has in a short space of time displaced Cantonese media content in Canadian multilingual television broadcasting. The rise in Toronto's Indian, Iranian, Korean and Pakistani immigrant communities has quickly established third language media presence to serve these audiences. With the recent announcement that China will premier its first 3D television channel, what will be the demand in Canada for dedicated 3D television service, who will be the audience and where will the programming content come from?

A decade ago Canadian content would not have included Canadian programming such as Little Mosque on the Prairie. Today this program is warmly embraced across Canada and widely syndicated abroad. Canadian radio and television advertising and journalistic content in English today prominently showcase spokespeople with distinctive accents such as British, Chinese, Italian, Indian and Jamaican to name a few. Cultural expressions in a third language are interspersed with English and French dialogue to appeal to specific audiences. New Canadians are shaping the future of Canadian broadcasting. This paradigm shift presents an array of new media options open to all Canadians, many of which are firmly entrenched in Canadian third language media and overlap into English and French language media with an array of ways and possibilities to effectively communicate, understand and be understood.

Technology: the Internet, Social Media and Culture Changes

With the implementation of Advanced Television Systems Committee (ATSC) standards, the advent of Internet television and G4 platforms on personal digital assistants (PDAs) third language consumer interactive media choices are vast. Particularly with younger audiences media multi-tasking is a given, often managed in conjunction with dedicated social networking to access the widest variety of possible communication, entertainment and information options that appeal to personal and cultural interests.

At the recent 2011 Durban Climate Talks, Climate Action Network Canada's Hannah McKinnon was podcast on the subject of Canada withdrawing from the Kyoto Protocol. It is reported that the podcast was posted to social media by via PDA by an interested fifteen year old, translated into Mandarin by a youthful friend who transmitted the feed via PDA to media in Mainland China, who then fed the story to Canadian third language broadcast media before it was even reported across either English or French Canadian broadcast media for political comment.

In You Lost Me author and youth expert David Kinnaman sees today's young people as the most ethnically diverse, where pop culture is their data stream, a group who are in this world but not of this world, where their number one education no longer comes from mum and dad. Mr. Kinnaman widely expresses his views across mainstream broadcast media, views that do influence attitudes about today's youth.

While today's youth are ethnically diverse, a closer look at their Canadian media habits, preferences and patterns shows that it is their media diversity beyond popular culture that is key to developing their knowledge base and sense of ethnic identity. In this, Canada's third language media bridge the gap between what is offered through popular culture and a rich tapestry of alternative cultural 'software' to download into their 'hardware'.

Beyond the historical patterns of the emergence and evolution of Canada's third language media industry, the industry's nature, shape and future will be determined to a greater degree by its ability to cohesively and effectively reach and delivery audiences in fair open market competition in balance between both commercial and cultural considerations in the face of rapidly changing communication technology options. This is clearly articulated in the NEPMCC Survey, its member opinions and is echoed in both Community Discussions and Leader Views contained in this report.

Grass-Roots Dialogue as Catalyst

The rapid introduction of new media technologies and public trends present strengths, weaknesses, opportunities and threats to Canada's third language media industry that must be managed in a creative, innovative, proactive and timely manner with balanced public and private sector accountability. While there is great validity in conducting in-depth research one does run the risk of making assumptions with anything less than current information.

An advantage of Canada's third language media is their ability to conduct targeted opinion polls across Canada's cultural and societal diversity in a timely manner that transcends possible language barriers. This ability to serve as a grass-roots catalyst in stimulating dialogue and feedback cannot be discounted both for Canada's third language media industry and for our changing society and culture that is largely driven by immigration.

Forces That Shape Canada's Third Language Media

Globalization

Canada's third language media reflect the dynamics of globalization that today's world is experiencing. Through the Internet, Canadian immigrants can maintain dedicated communication with family members abroad. Skype offers unlimited 'face-to-face time' with overseas family, online publishing places home country newspapers that are just a 'click' away from 'being home'.

Via global communication technology Canadian immigrants can maintain multiple cultural identities. Third language media assists them to manage the rate and progress of their assimilation in Canada at a pace that is within their 'comfort zone' in the growing global presence of population and cultural diversity, movement, transiency and 'in transit' self and group identity: all of which are supported by the 'friendly and familiar' across all media enabling family contact, discussion and links in our globalized reality.

One only has to go to an ATM in any Canadian urban banking setting and there will be a language menu option available. International financial transactions are easy, fast and generally reliable, and the presence and proliferation of international banks in Canada with multilingual staff makes it convenient to maintain a floating global financial identity.

Canadians are typically allowed to maintain dual citizenship, although with many countries this permission is not reciprocal. The concept however is a clear statement that Canada is a country that welcomes the retention of one's foreign identity. That, combined with a reputation for global peace-keeping and providing refuge for the oppressed, has uniquely positioned Canada's third language media industry to effectively voice the varied impact and changes that globalization manifests internationally by virtue of the close ties that third language speaking Canadians maintain with their home countries.

Joel Kotkin wrote that "global tribes" will "increasingly shape the economic destiny of mankind." One only has to observe the ease at which dispersed families conduct global business to appreciate Mr. Kotkin's prediction.

Diaspora

Diaspora is the geographic movement of large populations for a reason. Diaspora is commonly associated with injustice, intolerance and/or persecution resulting in the forced or voluntary relocation of a population to a welcoming new homeland. One example of diaspora is the Jewish diaspora which welcomed Jews world-wide to a ‘new homeland’ resulting in Israel becoming a state in 1948.

Canada has always been a ‘new homeland’ to large movements of populations, where, out of a group sense of a perceived negative experience an immigrating group seeks a safe place to build a new identity with a memory at the core of their remembrance, and a group purpose to build a better future life. It is in that building anew that Canada has emerged and grows, and in which Canada’s third language media established its deep roots and shared identity across its third language media fraternity.

Canada’s third language media today echo the ongoing reality of diaspora; populations moving, remembering and reuniting to rediscover group identity in a safe place, Canada; then tentatively shedding layers of negative past experiences to emerge in new community identities in the belief that they have come to ‘a safe place’.

Through third language media integration in Canada diasporic groups find ‘a safe place’ to reconnect with their communities around the world, share their resettlement experiences and ‘reach out’, locally and globally.

Canadian Immigration

According to Facts and Figures 2010 – Immigration Overview Citizenship, in 2010 Canada admitted more than 280,000 new immigrants of which over 100,000 are Economic Immigrants with the majority in the Skilled Workers category. Over 118,000 of 2010s immigrant population settled in Ontario with over 92,000 of them choosing to reside in the Greater Toronto Area (GTA). By comparison in 2010 54,000 immigrants settled in Quebec with 46,461 choosing to call Montreal home, over 44,000 in BC with over 37,000 going to Vancouver and 32,600 went to Alberta with the majority settling in either Calgary or Edmonton.

It should also be noted that in 2010 Canada had 278,146 Foreign Students, 981,137 Temporary Residents and 432,682 Foreign Workers registered. As previously noted, this information is subject to update when the results of Canada’s 2011 Census are released.

Over 200 multicultural and third language media publications and several multicultural and third language radio and television stations in the Greater Toronto Area (GTA) serve the more than 90,000 immigrants and 200 distinctive ethnic groups who move into the GTA annually. The impact of immigration and the rapid growth of third language media in the GTA are similarly observed in Calgary, Edmonton, Montreal and Vancouver, with a sharp increase of primarily Asian immigrants concentrated in these urban centres. As of 2006 Asians represented over three-quarters of Canada's visible minorities (Statistics Canada, 2008).

This influx has stimulated the fast growth and strong presence of Asian-oriented media enterprise and placed its operators in spheres of influence in Canada's cultural, political and socioeconomic and political environments through the commercial and cultural reality termed Canada's "Asian Audience" (Rodriguez, 1997), a group with both high disposable income and a strong desire to purchase and its settles into life in Canada.

With such large immigrant populations and the buying and political power that they represent also comes the need for a high level commitment to social responsibility in good stewardship to ensure balance between the commercial proposition and all communities' needs for meaningful dialogue and interaction. It is through leadership to ensure such balance that third language media operators have the opportunity to assist immigrant populations to find their sense of multicultural Canadian identity especially in evidence of a proliferation of third language programming and editorial content that supports local third language content but which is not Canadian in origin and does not focus on the multicultural nature of Canadian society.

Settling and Community

Geography and ethnicity shape each other (Matsaganis, Katz, Ball-Rokeach, 2011). Following is a short case study of the author's adopted children, four of five siblings from the same home in Jakarta, Indonesia who share the same goals for a North American higher education. They studied and settle abroad-one in the GTA, one in Thunder Bay, two in the Washington, DC area. Settling in different countries and communities resulted in different migration outcomes for each sibling, both in terms of their cultural adjustment and local opportunities.

The sibling who settled in the GTA had no local Indonesian language media to provide him with needed cultural, community and information resources. The two siblings who settled in the Washington, DC area had access to a rich variety of local Indonesian language media. The fourth sibling who settled in remote northern Thunder Bay had neither access to either a local Indonesian community or to local Indonesian language media.

After one year different migration experiences were observed between siblings despite shared ethnicity and upbringing. The link that united them across migration and settling was texting and Skype communication interactivity between each other and with the family in Jakarta. The sibling in Toronto preserved his Indonesian culture, but partly due to no presence of local Indonesian language media has chosen to return to Jakarta after studies in Canada.

The siblings who settled in the Washington, DC area rapidly adapted to a North American lifestyle in the presence of abundant local Indonesian third language media which lead to discovering vibrant local Indonesian, communities, finding a sense of belonging and networks to assist in cultural and adjustment. The sibling who settled in Thunder Bay who was denied both a local Indonesian community and local Indonesian media access simply immersed herself in her studies and has not effectively established a Canadian socio-cultural interface.

This case study demonstrates that ethnicity and geography affect and are affected by each other. This relationship is termed geo-ethnicity (Kim, Jung, & Ball-Rokeach, 2006).Geo-ethnicity emphasizes that “no two communities can be assumed to be the same, even if they seem very similar from the outside”, such as the GTA and Washington, DC, two large North American multicultural urban centres. “Ethnicity cannot be considered without geography, and geography cannot be considered without ethnicity.” (Kim, Jung, & Ball-Rokeach, 2006).

Understanding this symbiotic interactive relationship between geography and ethnicity speaks directly to the role that Canadian third language media, and particularly local publications play in the dynamics of (im)migration, settling, adjustment and community evolution.

Transforming Industry Structure

Traditionally Canadian third language media provide advertising, community information, news and commentary, support cultural sustainability and offer a necessary public forum for their respective communities, with content that is largely produced in Canada for domestic and interested global third language audiences.
Today however many Canadian third language media enterprises are trans-nationalized or in the process of trans-nationalizing, meaning that their content (which may include editorial content) to some degree is produced by associated media outlets in home countries rather than in Canada by Canadian third language media outlets which historically have been founded by immigrants to serve Canadian immigrant cultural groups.

As Canadian third language media increasingly trans-nationalize, identifying the transformation mechanisms and structures may be challenging as relationships and ownership are not always clearly defined. Diversified global companies and advertising agencies alike identify emerging Canadian consumer markets and participate in trans-national commodification within Canada’s existing media third language media industry.

They may leverage existing core business relationships in Canada to initiate ‘ethnic marketing’ initiatives, influence local opinion and build consensus for new market entries.

Mainstream vs. Third Language Media

What are the differences between Canada’s mainstream media and third language media? Sociologists Alba and Nee (2003) define the mainstream as “that part of society within which ethnic and racial origins have at most minor impacts on life chances or opportunities”. This implies that mainstream includes the ethnic majority but the two are not identical, that the boundaries of mainstream society circumscribe that of the ethnic majority.

In Canada where Asian populations in Vancouver and Markham are the majority of the population, can they locally be considered ethnic majority or are they mainstream?

Given that ethnicity and geography are interrelated (Matsaganis, Katz and Rokeach, 2011) the boundaries that traditionally define mainstream and third language media in fixed terms today are the ever-shifting balance between yin and yang.

Mainstream media and third language media compete for advertising dollars. Where they differ is that mainstream media are heavily controlled by corporate and political interests and third language media tend to broadcast/publish news content unfiltered, albeit the trans-nationalization of major Canadian third language media would have a dilution effect on this differentiation.

Clearly though, mainstream media see today’s third language media as being serious competitors especially as they vie for Canada’s lucrative Asian markets. The opportunity for both is to build bridges through forms of collaboration to gain more effective access to the markets that they are competing for, share ‘know-how’ and ultimately appreciate and come to better understand Canadian diversity and multiculturalism.

The Economics of Third Language Media

Media Buying Decision-Making

One of the major challenges of Canadian media buyers is to make accurate, cost-effective buying decisions for advertisers based on cost per thousand (CPM) impressions delivered to chosen target audience(s) at a designated reach and frequency. Accurately targeting and delivering large audiences is traditionally predictable because of established audience measurement tools based on reliable research data supplied by two primary sources; Canadian Advertisers Rates and Data (CARDonline) for print and broadcast media and Broadcast Bureau of Measurement (BBM Canada/Sondages BBM in Québec) for broadcast measurement and consumer behaviour.

Following are excerpts from their respective websites, www.cardonline.ca and www.bbm.ca;

CARDonline:

"CARDonline contains current data on advertising rates, circulation, mechanical requirements, key contacts, branch offices, issuance and closing dates and other related data in national print and broadcast media in Canada. Sections on dailies, community newspapers, consumer and farm magazines, ethnic and business publications, radio and television stations, and online and out-of-home media. Regular departments include advertising agencies/personnel, Canadian media associations and representatives.

CARD, the print version, is published bi-monthly (Location: INNIS Reference HF 5801 .C35). It includes the annual print Publication Profiles which details editorial profiles of periodicals in Canada (Locations: INNIS and MILLS Reference HF 5808 .C2 S831)."

BBM:

“BBM Canada, Sondages BBM in Québec, is a not for profit, member-owned tripartite industry organization, which has been operating since 1944. We provide broadcast measurement and consumer behaviour data, as well as industry-leading intelligence to broadcasters, advertisers and agencies. Our sophisticated data tracking and measurement technologies and services gather relevant information on audience behaviours during and after broadcasts, giving our members business critical insights into the impacts of broadcast content and consumer behaviours. By providing important audience and consumer behaviour information and intelligence, we enable broadcasters and advertisers to deliver high quality and relevant programming that meets the clearly defined needs and wants of Canadians.

Our services include national and regional TV/Radio meter panels employing Portable People Meter (PPM) technology, diary surveys for our 100+ radio and television markets, and a variety of syndicated and custom research studies. This information is used by:

- TV and Radio stations to help them understand who their audiences are;
- Advertisers that want to reach people who might be interested in their products;
- Advertising agencies, and;
- Other broadcast-related organizations.

Canada’s vibrant third language media audiences are highly desirable markets for Canadian advertisers. Both CARD and BBM recognize this and have made significant advances to provide advertisers, advertising agencies and media buyers with reliable data to make informed decisions on reaching these audiences, yet there are voices to the contrary who feel that the four sources of independent audience data in Canada: BBM, Newspaper Audience Databank Inc., Nielsen Media Research and the Print Marketing Bureau under-represent the number of third language viewers and readers in general audience surveys. Perhaps it is time for the third language media industry to compile and market its own research.

There is a distinct gap between large Canadian third language media groups which reach sizeable, measurable multicultural audiences, and small to medium independent third language media companies which serve niche cultural audiences, most notably within Canada’s third language press. For example OMNI-1 and OMNI-2 provide focused media buying access to large multicultural groups in Ontario, BC’S Fairchild TV and Talentvision provide access to large Cantonese and Mandarin speaking audiences with over 300 hours of weekly programming and CHUM Ltd., which dominates the ownership of third language radio stations across Canada and CHIN-Radio the Toronto’s flagship of third language multicultural radio broadcasting are relatively easy media buys because they offer concentrations of both large multicultural and third language-specific audiences.

By contrast, Rainer Geissler and Horst Pöttker in their book *Media-Migration-Integration: European and North American Perspectives* point out that Canada's third language media "Consist of mostly small broadcasters, cable channels, newspapers, and magazines that target racial and ethnic minority audiences", that "Many are 'mom and pop' start-ups, published on a weekly or intermittent basis in languages other than English or French and distributed free of charge." Today Mississauga, Ontario is home to over 30 publications serving South-Asian communities. Many of these publications are free, and as such have attracted and hold wide audiences and are the key to their local disposable income but they find difficulty to present a measurable, unified media buying option to other than local advertisers.

Insightfully, media scholars Dal Yong Jin and Soochul Kim observe that, "Media experts admit that the next media battle will be among the ethnic media, especially Asian-oriented media, and, accordingly, they have developed new strategies and business models to target this growing market of Asian consumers. In Vancouver, the cultural shift by 2017 will be even more dramatic as the majority of people in the region - approximately 53% - are projected to be counted as part of a visible minority (Statistics Canada, 2005). These demographic statistics indicate a new social and cultural reality, which is the Asianization of Canadian society and its economy."

On April 23rd, 2007 Ming Pao Enterprise Corporation Limited ("MPE" Hong Kong stock quote: 685) announced that it signed a "consolidation" Merger Agreement with Malaysian publicly listed Sin Chew ("SCM" Malaysia stock quote: 5090) and Nayang Press ("NPH" Malaysia stock quote: 3964) "to create a global Chinese language media group to form one of the largest global Chinese media platforms." In the press release of this tri-party merger it was expressed that the merger represents an opportunity to compete "in a borderless world economy … in a more aggressive yet strategic manner … serving those who can read Chinese around the world" from a multi-media platform, and that certainly includes their current US and Canadian operations and holdings and expansion plans for these vibrant markets to create strong shareholder value.

Commoditization

In the November 2011 publication of the International Journal of Communication, Jin and Kim continue to write on the commoditization of Canada's Asian-language media markets; "Several media sectors, both ethnic media and national media - from traditional mass media (such as newspapers, radio, and network broadcasting) to new media (including cable and the Internet) - have rapidly turned their attention to Asians who are primarily Chinese and Indians, but also include Filipinos and Koreans, as their new target audiences. In the midst of the Asian population growth of both immigrants and non-immigrants mass media have been actively involved in the profit-making process by commodifying Asian consumers whose purchasing power is overall higher than other ethnic groups."

They continue to observe that, “Just as many national mass media have lost their power in providing a public sphere due in large part to their emphasis on economic imperatives; ethnic media have turned into market-driven commodities.

While some ethnic media remain part of a public sphere for cultural diversity, cultural heritage, and equal rights, the majority of ethnic media have swiftly been absorbed as part of the Canadian market, not only as marketing tools, but also as major commodities.”

Viability and Sustainability of Small Independent Publishers

Notwithstanding the apparent movements in large third language markets Canada’s third language independent publishers derive the greatest portion of their revenue from local advertisers (NEPMCC Survey, 2012). Production and postage costs are high, paid circulation is modest and profits often evaporate with the additional cost of production over-runs to provide free copies to associations, community and faith groups.

Small third language independent publishers maintain the industry’s closest community links and despite recent efforts by government to be more accessible for question and comment few of Canada’s third language small publishers have the resources to maintain a consistent press presence or voice in Ottawa. They are too busy delivering publications and worrying about how to pay next month’s rent. Here is what the members of the National Ethnic Press and Media Council have to say about their business realities.

Research Perspectives

NEPMCC Survey:

Social and Economic Survey of National Ethnic Press and Media Council of Canada Membership

Survey Executive Summary

The members of the National Ethnic Press and Media Council of Canada (NEPMCC) were surveyed through across summer 2011 ending September 30, 2011. Two hundred twenty-three members participated, almost one-third of the association's 530 members. The following is a brief profile of ethnic/third language media in Canada, as prepared and analyzed by Professor James Davidson, Seneca College with data confirmation and preparation of graphs by Seneca International Business student Pahala Manurung in January 2011 across four key areas: Business Challenges, Company Profile, Content & Distribution and Readership Base.

Business Challenges

- Financial concerns were the primary top-of-mind challenge. Related themes were advertising revenue, government funding and the impact of new technology on the number of consumers. Likewise, when they were presented with a list of challenges, half of respondents perceived "financing future growth" (37%) and/or "day-to-day financing" (42%) as "insurmountable" or very difficult".

- To address these challenges, some respondents recognized the need for creative problem-solving and cost-cutting. Some others saw no solution. This suggests the need to share best practices among members.

Company Profiles

- The most common forms of business ownership were “Canadian-controlled private corporation” (18%) and “sole proprietorship” (23%) and “family” and “non-family partnership (23%). 5% however reported ownership by a foreign corporation.

- They “work from home” (25%) or use “serviced office space” (20%) or a “virtual office” (23%).

- The vast majority (95%) had less than 10 full-time employees; two fifths had “no full-time employee” (17%) or “one full-time employee – self” (20%). The vast majority (87%) outsourced at least part of one or more job functions.

- 31 had 2010 gross revenue below $50,000, with the majority (62%) under $500,000.

- In terms of revenue by media-type, “newspaper” was cited by 71 percent.

  - Local advertisements accounted for 70 percent of ad revenue, on average.

  - Advertisers from “our target ethnic group” accounted for 57 percent of ad revenue, on average.

  - “Product production (22% average). “payroll (67%). “rent (44% average) and “product distribution” (11%) accounted for seven-tenths of expenses. Marketing was only 6%.

  - Businesses tended to be located in “Toronto” (32%). “Vancouver” (7%) and “Montreal” (5%).

  - The number of business formations was fairly uniform over the past 25 years. Only four percent (4%) reported that their oldest senior executive was less than 35 years old.

  - Senior executives tended to be drawn from “our ethnic target group” (67% on average).

  - One fifth (20%) of organizations had a written succession plan for executives.

Survey respondents (i.e. key people working in Ethnic Media) had the following profile:

- Three-fifths (60%) had more than one job title, which was reflected in the high portion of small companies.
- The average age was 51; 7% was 65 or older.
- 3% were born in Canada, 10% came to Canada within the past decade.
- The most common methods of entry into Canada were: “economic class (20%), “skilled worker” (37%), “family class” (20%), “refugee” (14%) and “student” (9%).
- They were more likely to be born in Asia (44%) than the EU (17%) or other parts of the world.
- The average household size was 3.4.
- The most common living arrangements were: “my spouse” (44%), “my children under the age 18” (23%), and “my grown unmarried children” (13%).
- Relative to the Canadian adult population, they were more likely to hold a university degree (66%).
- Household income did not vary significantly from the entire population.
- 43% reported that they “do not earn money from their work in ethnic media”; only 12% generated all of their employment income from ethnic media. Other sources of employment income included “sales (14%), “skilled labourer” (7%), and “professional” (46%).

Content & Distribution

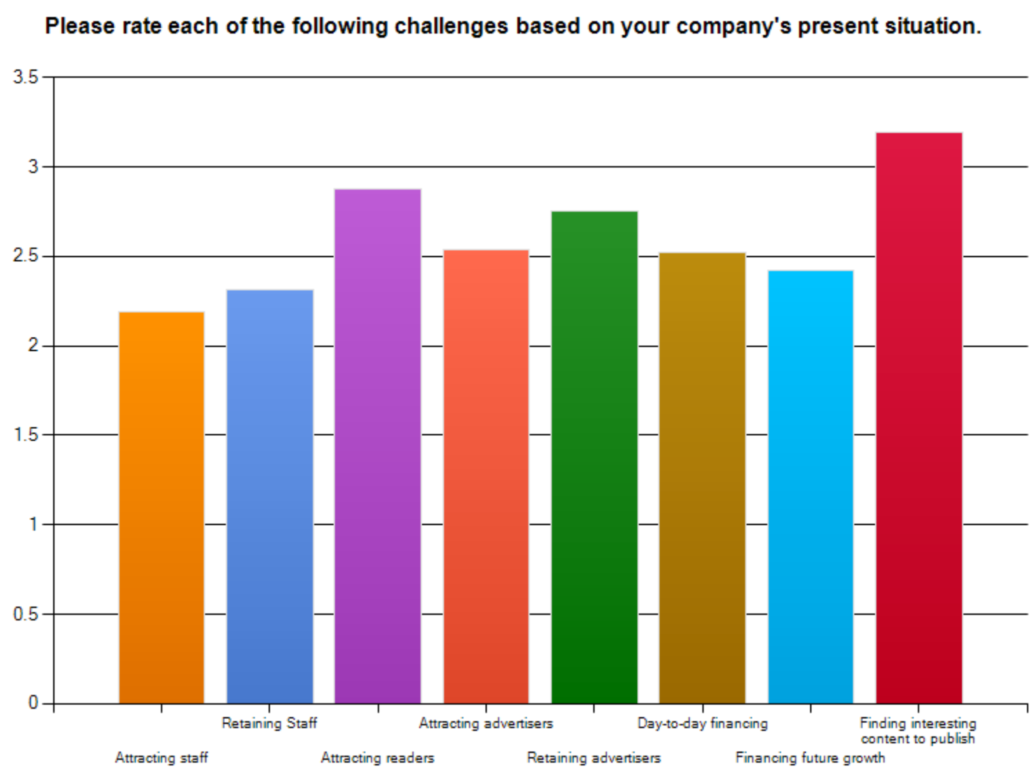
- Content was distributed across “local news” (42%), “national news” (20%) and “international news” (16%).
- “English” (52%) was most commonly used in publication. French (6%) ranked third.
- Over half (52%) reported an average weekly circulation under 10,000.
- With the exception of home delivery, “free” (42%) was more common than “paid” circulation in a given distribution channel (e.g. ethnic stores and restaurants).

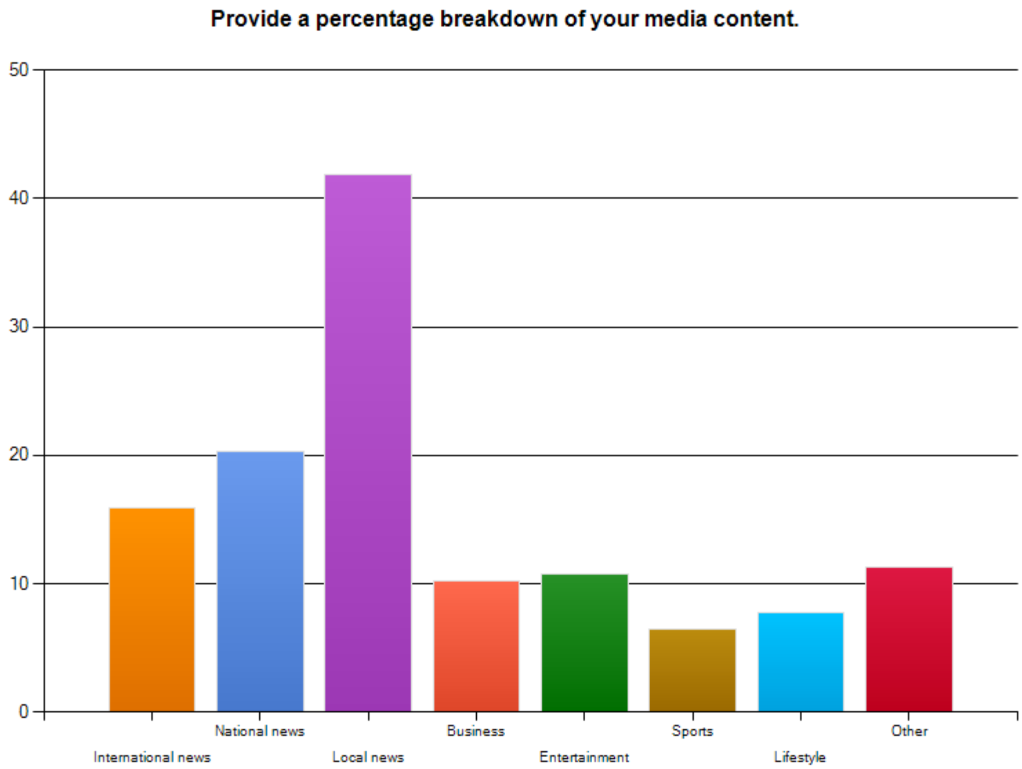
- Delivery to retail (63%) and homes/offices (54%) tended to be prepared in-house.
- The majority of copies were distributed in “the city/town where we publish” (average 62%) or “other parts of the region (22%).
- On average, 62 percent of content was obtained from Canadian sources.
- Some respondents were optimist about gains in revenue and staff size, whereas others anticipated a bleak future.

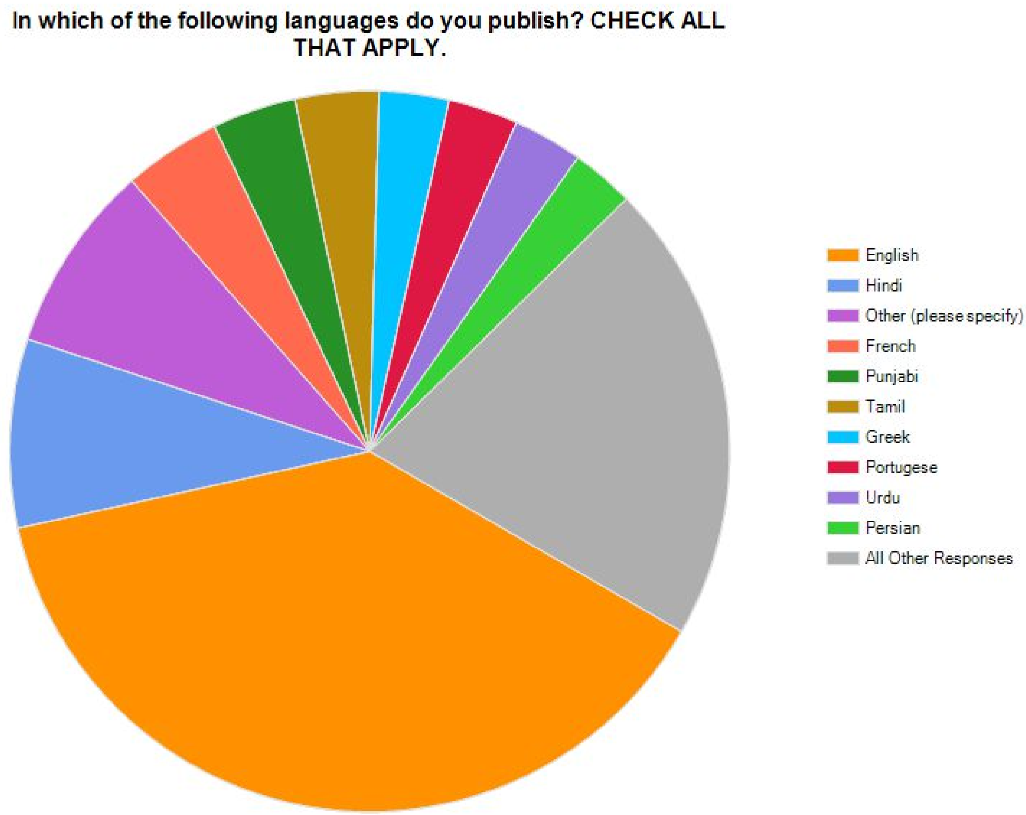
Readership Base

- Primary target groups were: “Both males and females” (80%).
- Young and old were less likely to be primary targets (<18: 11%, 18 to 24: 44%, 75+: 22%).
- “Third/fourth generation” (40%) were included less often than other immigrant group.

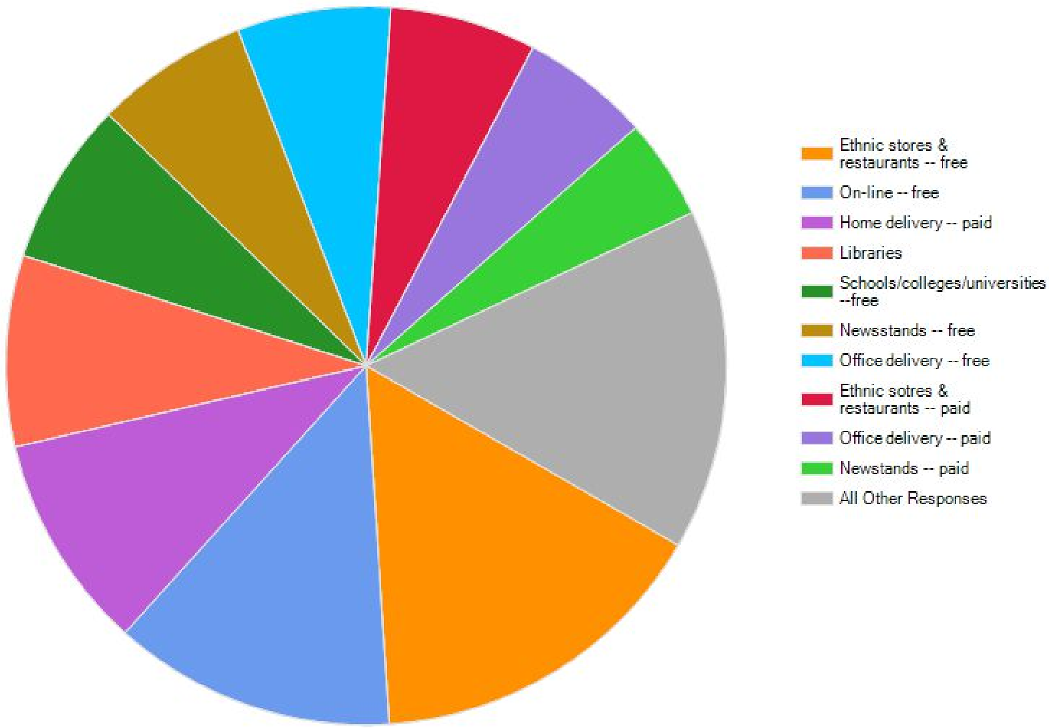
The Survey at a Glance



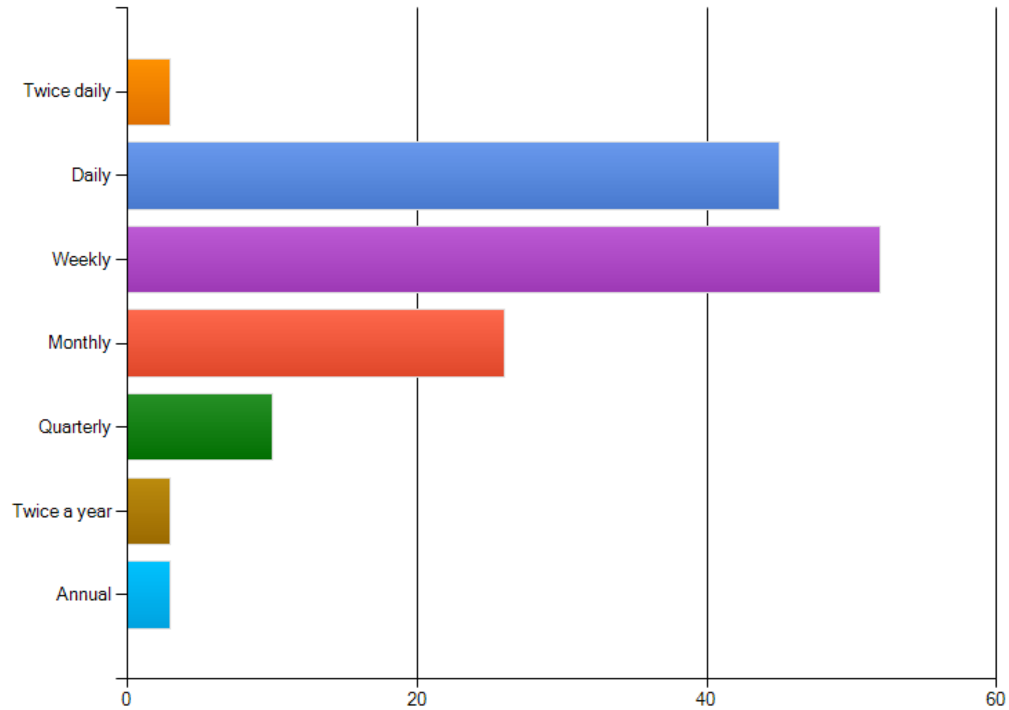

Provide a percentage breakdown of your media content.
50
40
30
20
10
0
International news
National news
Local news
Business
Entertainment
Sports
Lifestyle
Other


In which of the following languages do you publish? CHECK ALL THAT APPLY.
English
Hindi
Other (please specify)
French
Punjabi
Tamil
Greek
Portugese
Urdu
Persian
All Other Responses

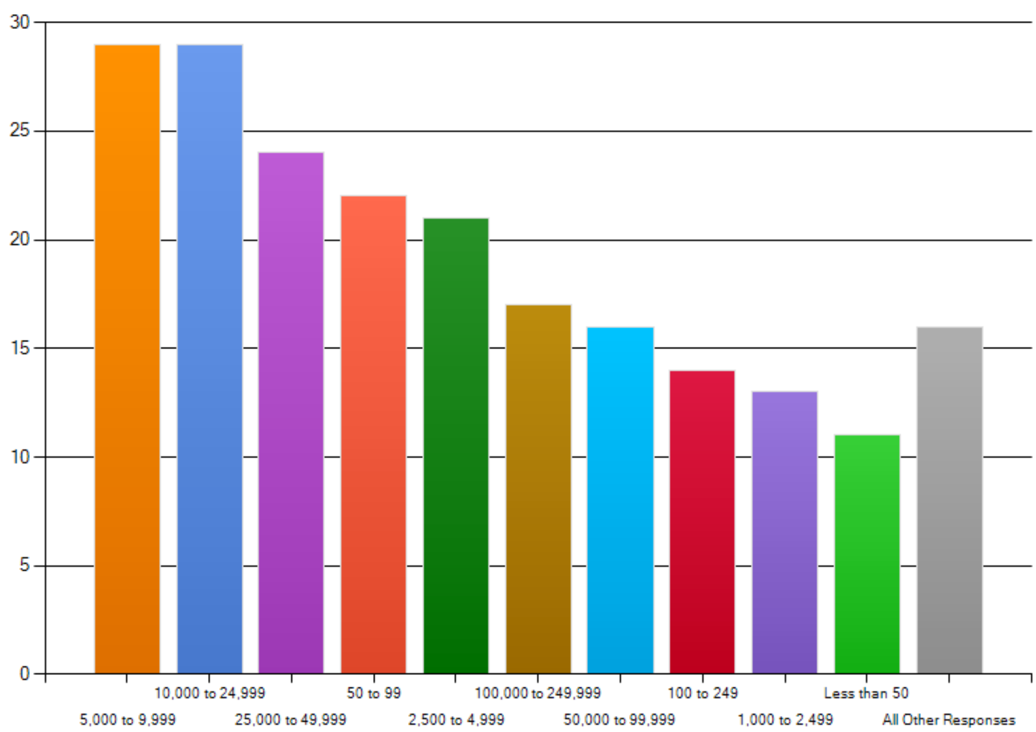
Please indicate where your publication is distributed? CHECK ALL THAT APPLY.



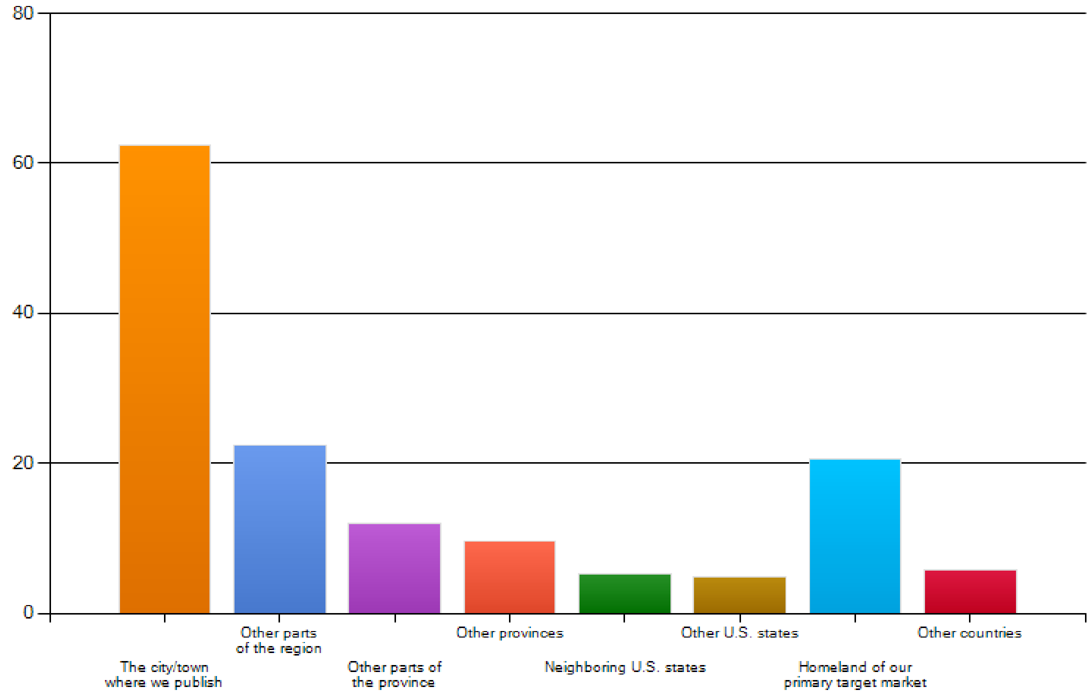
How Often do you publish a hard copy?



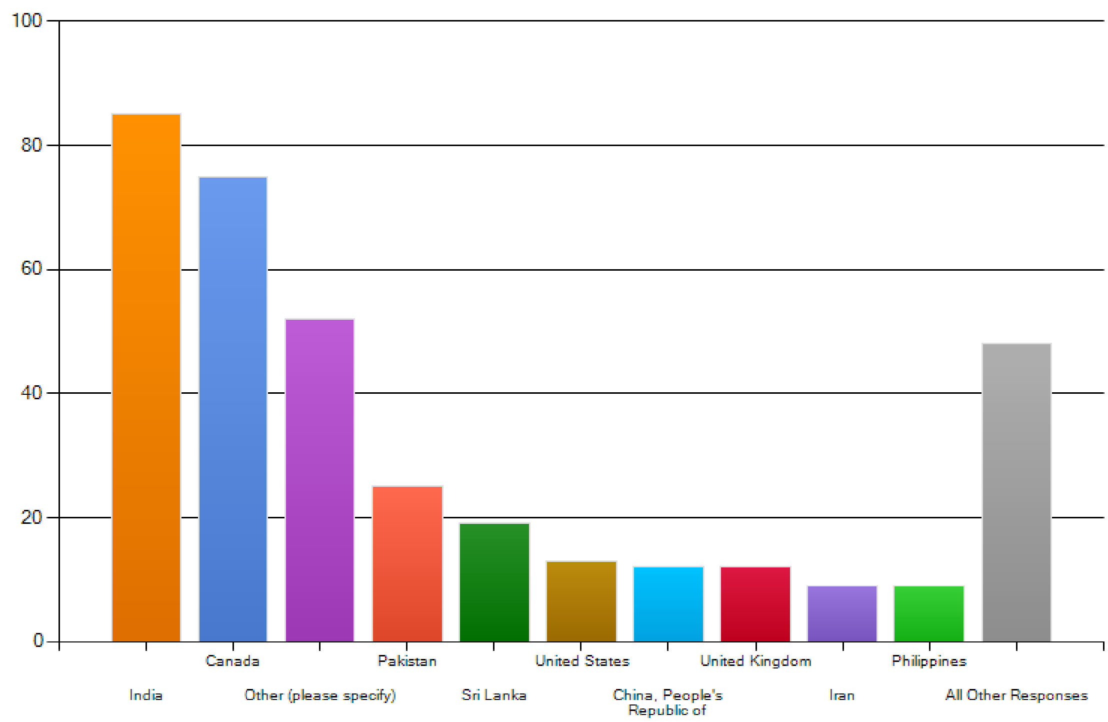
Think back over the 12 months. What was your average weekly circulation?



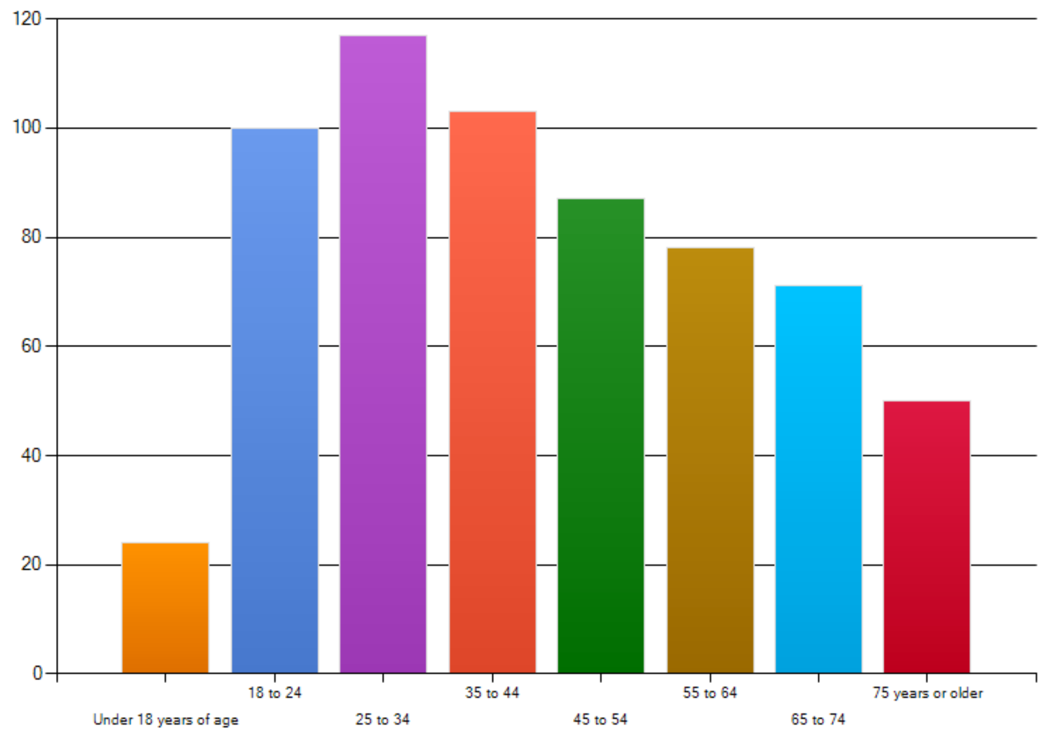
Consider your hard copy circulation. Provide a percentage breakdown by geography. Do not include the circulation of a parent/sister publication. The total will equal 100.



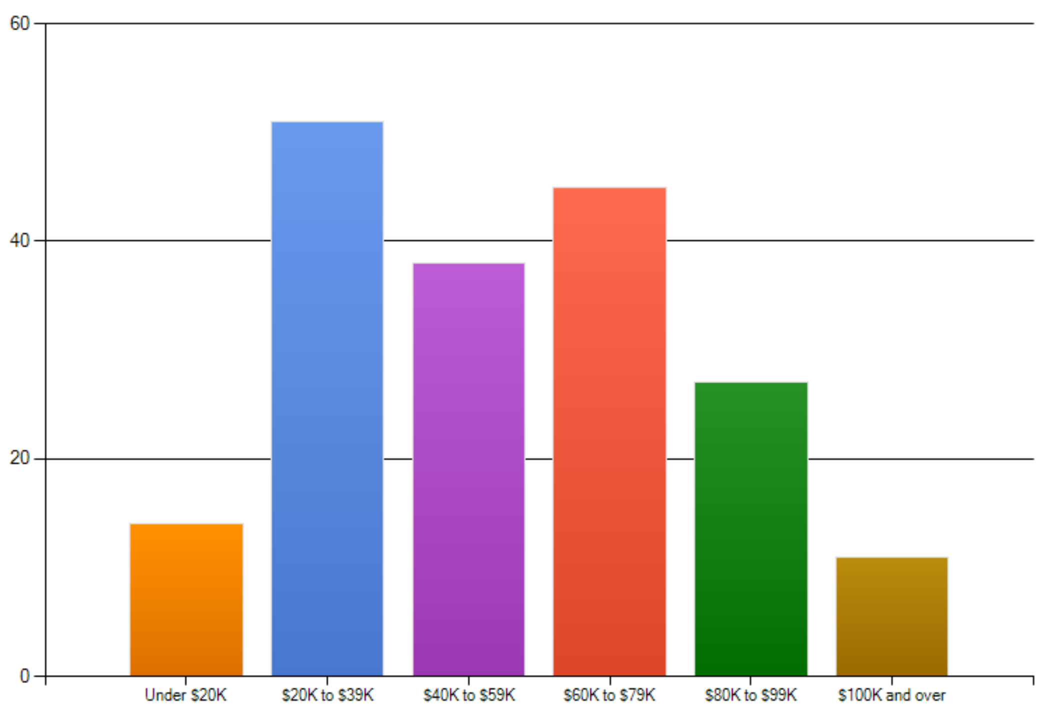
What is the homeland of your primary target market(s)? CHECK ALL THAT APPLY.



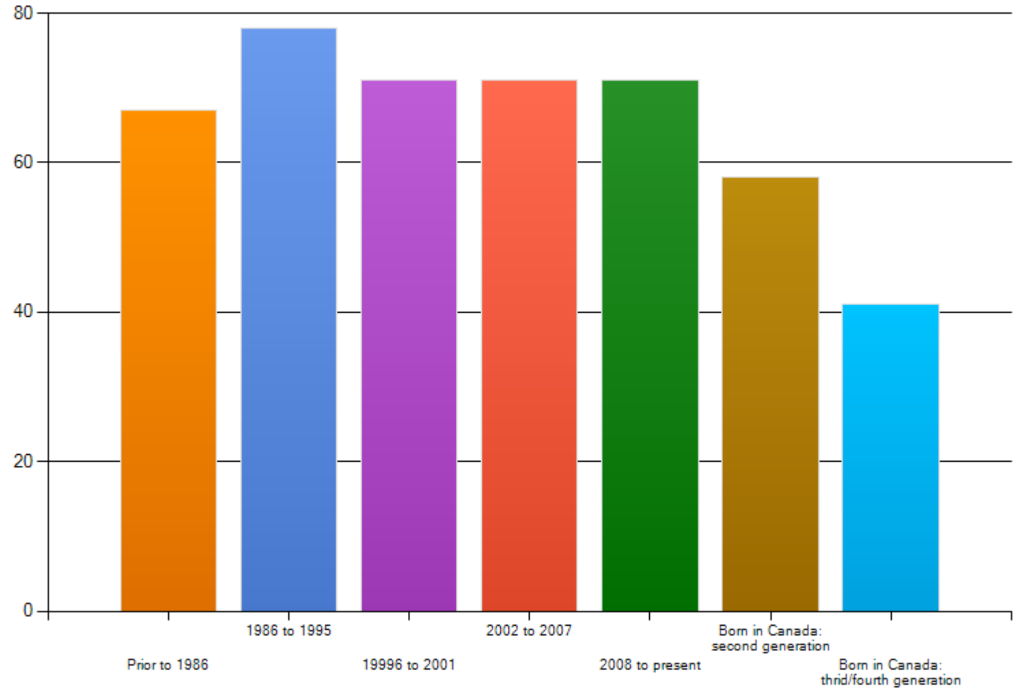
Which age group (s) is your primary target market? CHECK ALL THAT APPLY.



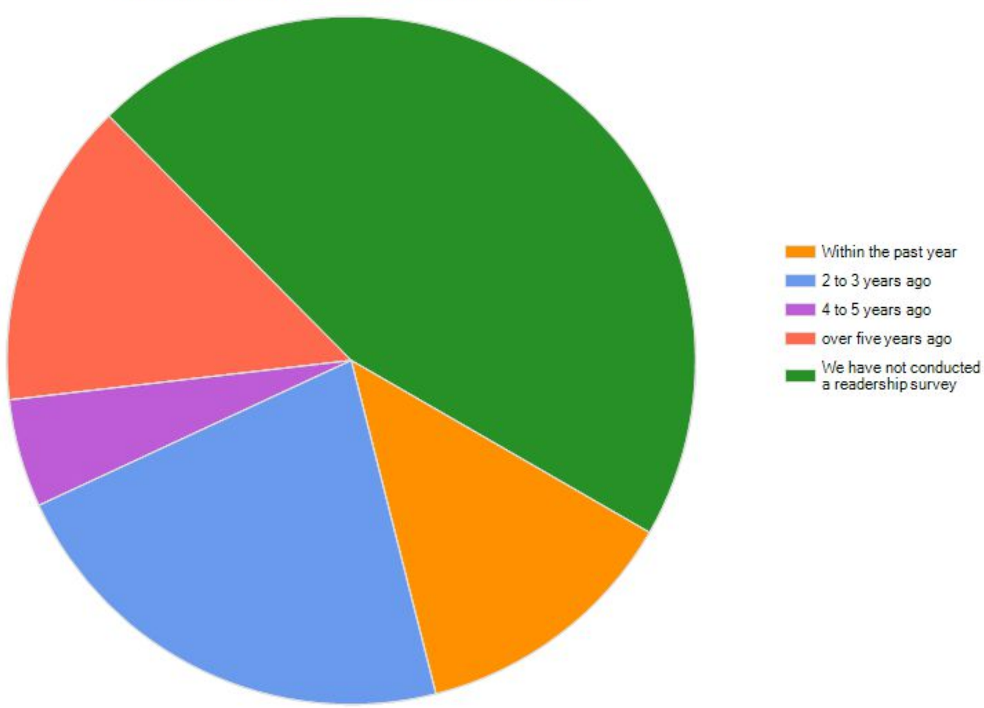
Which household income category(ies) does your primary target market fall into? CHECK ALL THAT APPLY

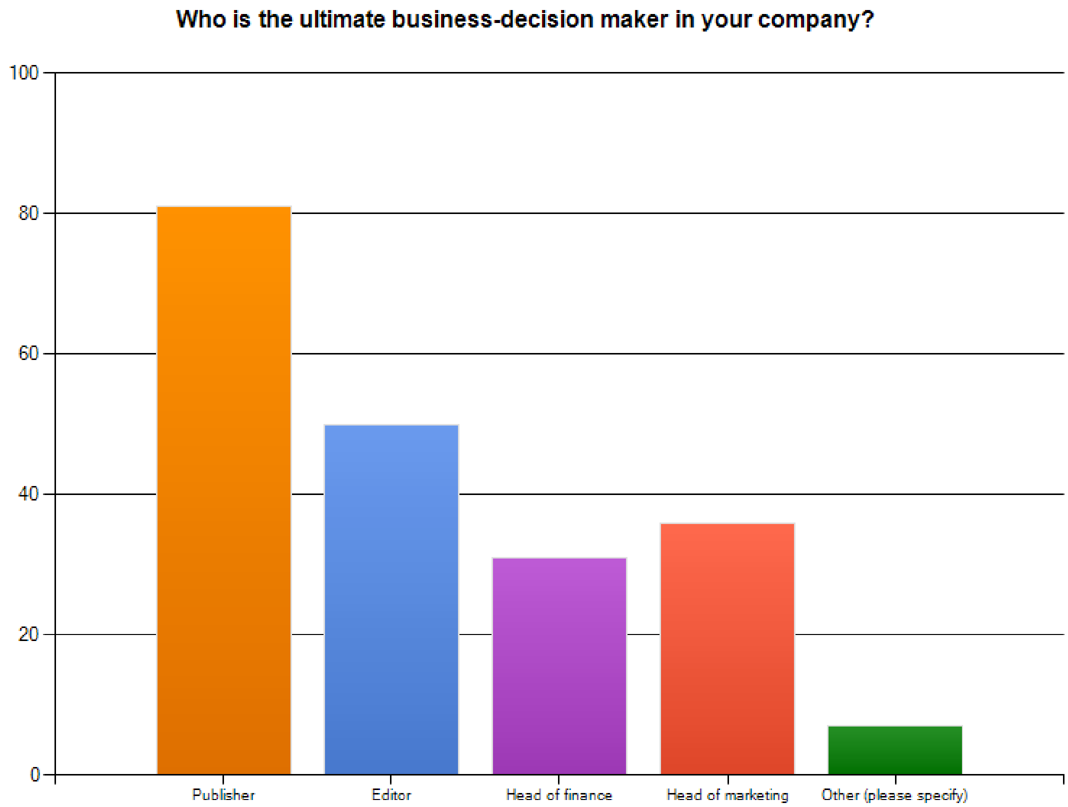


Consider your readers who live in Canada. "Our target market immigrated to Canada in the years ______________." CHECK ALL THAT APPLY.

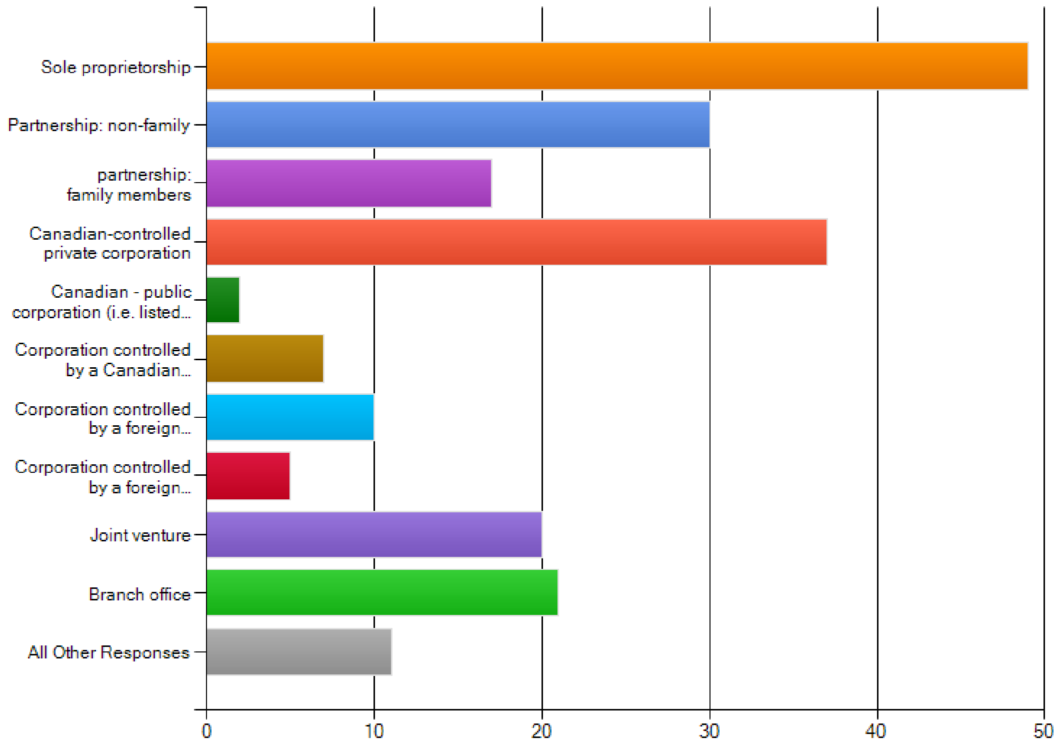


Has your organization conducted a survey to develop a demographic/lifestyle profile of your readers?

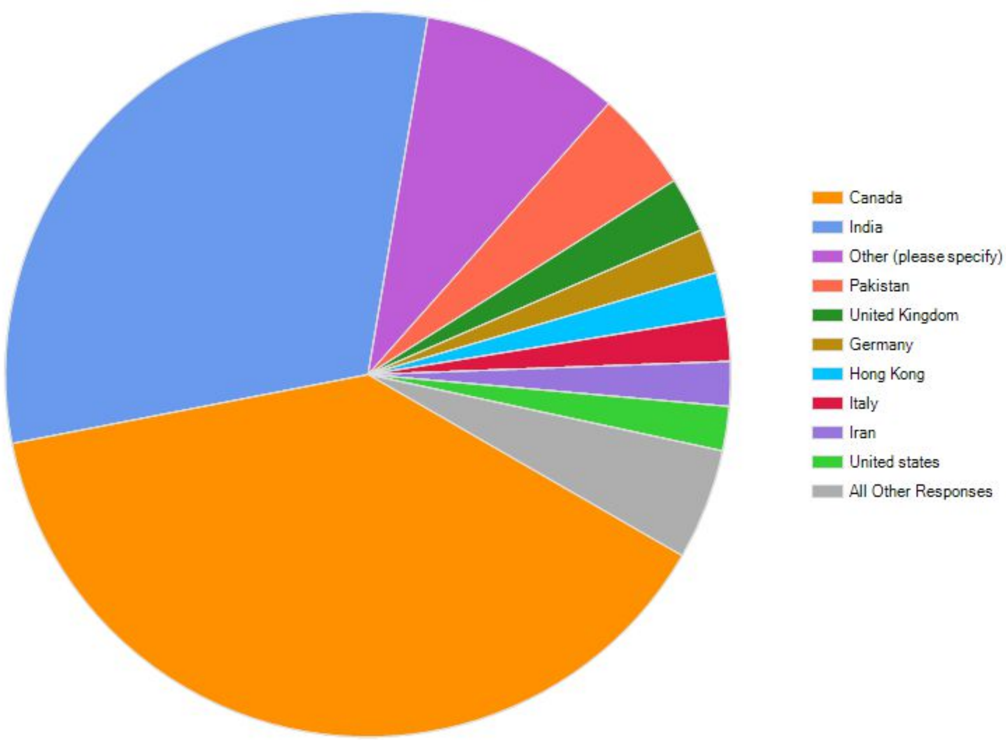


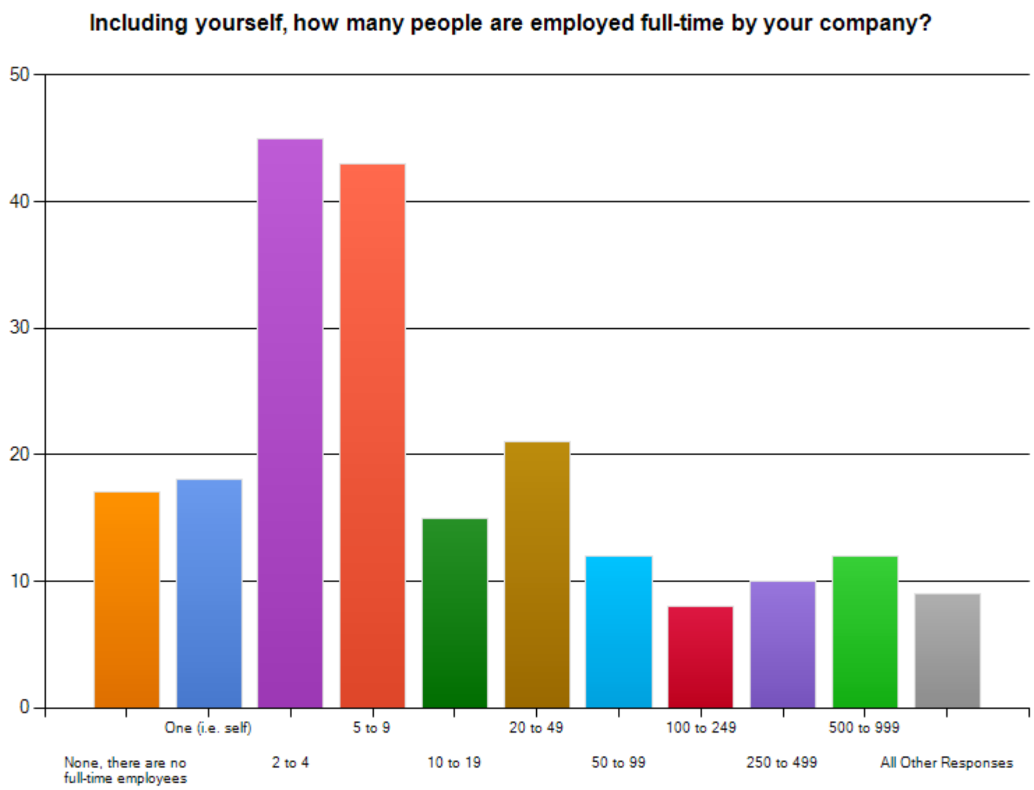

Who is the ultimate business-decision maker in your company?
100
80
60
40
20
0
Publisher
Editor
Head of finance
Head of marketing
Other (please specify)

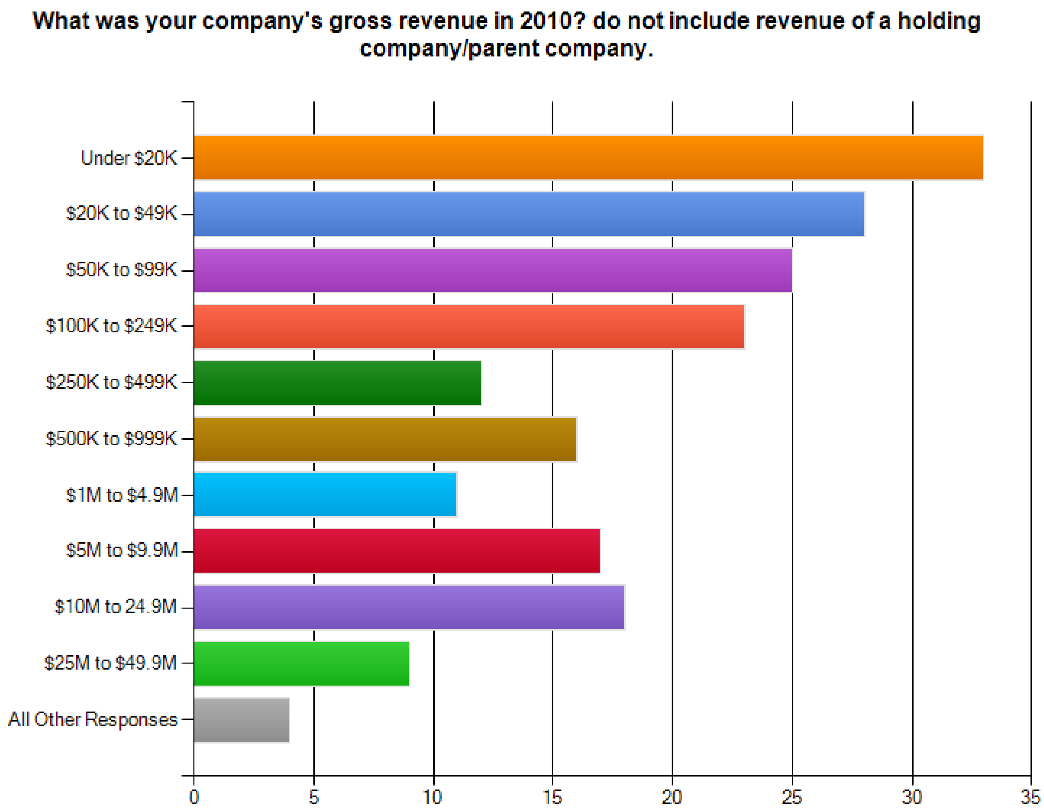
What of the following best describes the ownership of your company?



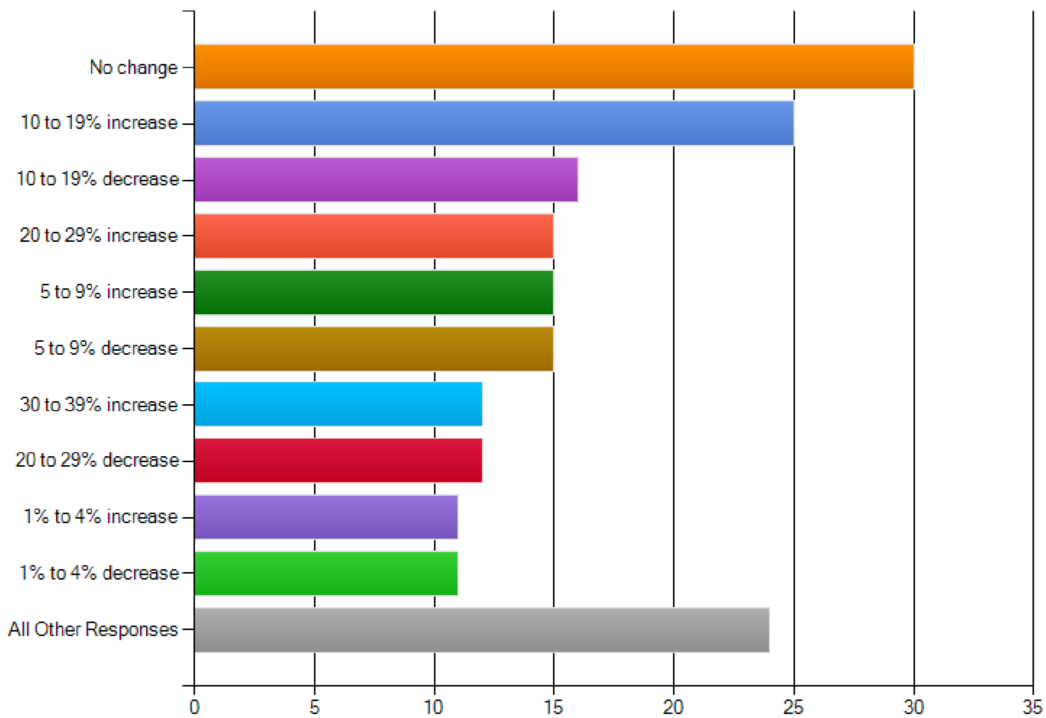
Where is your ultimate-parent company located?



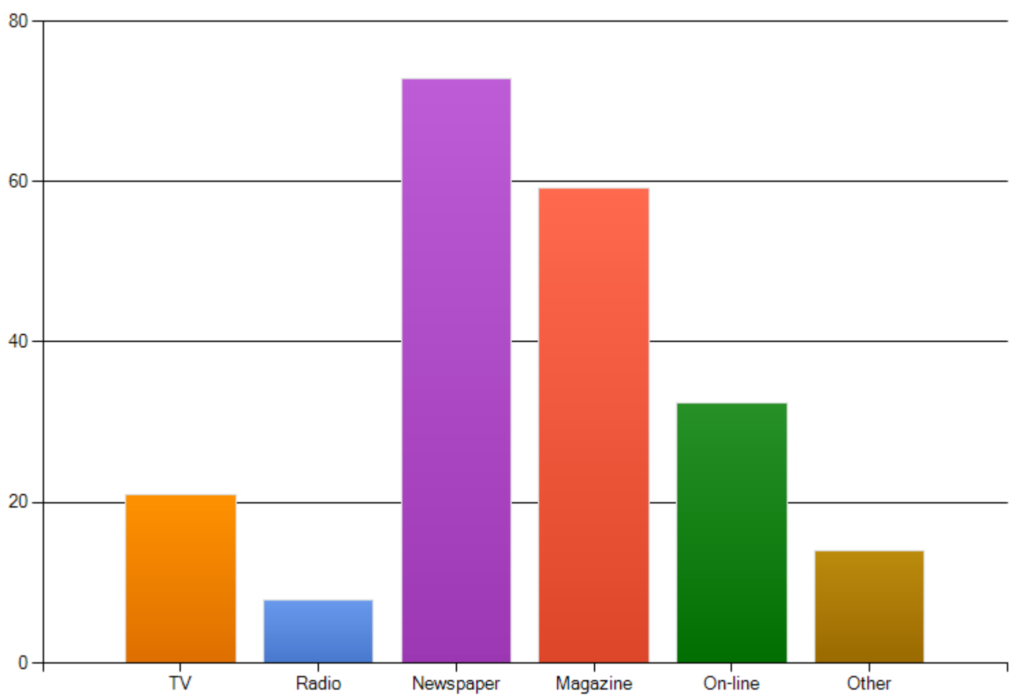

Including yourself, how many people are employed full-time by your company?
50
40
30
20
10
0
None, there are no full-time employees
One (i.e. self)
2 to 4
5 to 9
10 to 19
20 to 49
50 to 99
100 to 249
250 to 499
500 to 999
All Other Responses

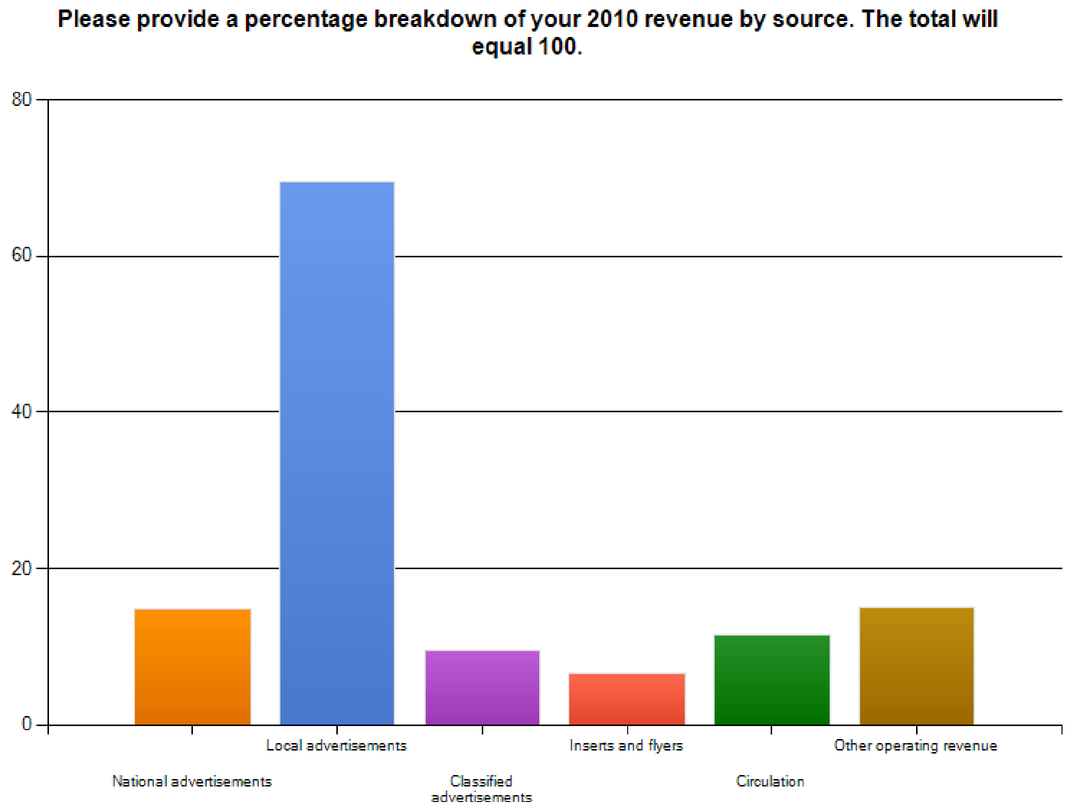

What was your company's gross revenue in 2010? do not include revenue of a holding company/parent company.
Under $20K
$20K to $49K
$50K to $99K
$100K to $249K
$250K to $499K
$500K to $999K
$1M to $4.9M
$5M to $9.9M
$10M to 24.9M
$25M to $49.9M
All Other Responses
0
5
10
15
20
25
30
35

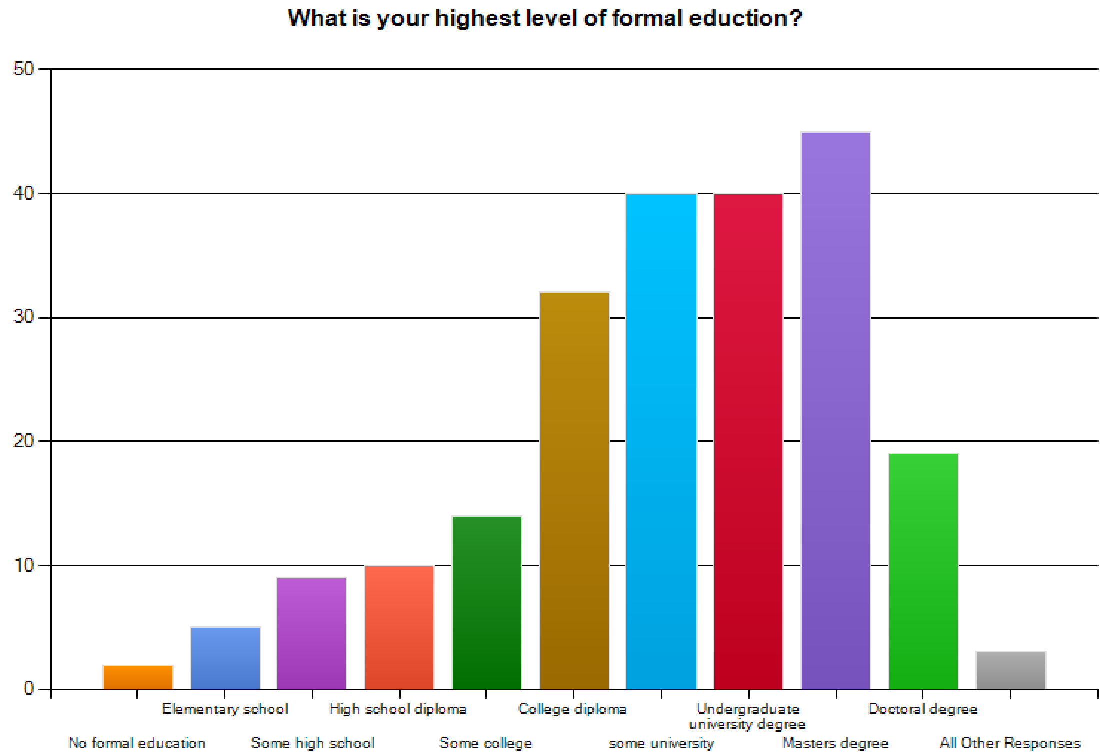
To what extent, if at all, do you project your 2011 revenue to increase or decrease relative to 2010?



Please provide a percentage breakdown of your company's revenue by type of media. Do not include sister companies or parent company.




Please provide a percentage breakdown of your 2010 revenue by source. The total will equal 100.
80
60
40
20
0
National advertisements
Local advertisements
Classified advertisements
Inserts and flyers
Circulation
Other operating revenue



Survey

1 Introduction

Commencing in summer 2011 through September 30, 2011 members of the National Ethnic Press and Media Council of Canada were surveyed. Two hundred twenty-three members participated; over 40 per cent of the association's 530 members. Seneca College designed the survey questions and analyzed the data.

1.1 Objective

The objective of the survey was to profile the Ethnic Media industry in Canada:

1. Business challenges
2. Perceptions of the future
3. Revenue size
4. Sources of ad revenue
5. Number of full-time employees
6. Outsourcing
7. Sources of content
8. Distribution channels
9. Target market

1.2 Method

The questionnaire was designed in collaboration with Seneca's School International Business. Telephone interviews were conducted by representatives of the National Ethnic Press and Media Council of Canada. Respondents had the option of completing the survey on-line.

2 Key Findings

2.1 Business Challenges

Let us first consider business challenges as they provide a window to the industry.

2.1.1 Challenges: top-of-mind

At the beginning of the survey, respondents were asked, "At present, what is the biggest challenge faced by your organization?" (Appendix 1).

The dominant theme was "financial resources". Comments included:

• "Not having enough financial resources to hire additional staff ... We are also dealing with declining advertising support due to the economic downturn."

• "We do not have enough resources to run and publish our monthly newspaper."

A related theme was "advertising":

• "We have to compete for the same advertising dollars ... We do not have the resources to market ourselves like the Star or the Sun, and a result have very little scope to make publishing a profitable venture."

• "Small publications who charge very little money, but claim huge circulation make it hard for corporate Canada to trust ethnic media."

A lack of government funding was mentioned by several respondents and there were several comments pertaining to changing technology and/or readership:

• "… a decline in readership due to mortality (post-war immigration generation) and Internet availability for younger readers …"

• "The biggest challenge is our readers could access news all over the world ... The web takes away most of the newspaper business."

2.1.2 Solutions: top-of-mind

Then, respondents were asked, "How is your company addressing that business challenge?" (Appendix 2).

Cost-cutting measures were a common response:

• “We have been managing because it is one of the oldest newspapers so there is still some support from the business community. We also have to cut many things to survive”

• “Through a combination of borrowing ... and cutting back on expenses … We are about to embark on direct solicitations to community members to donate funds for the paper’s continuation.”

Many respondents reported that they are pursuing advertising revenue:

• “Trying to be innovative in terms of generating advertising revenue by going online and joining [social networks].”

• “Solicit ads from as many businesses as possible that advertise in other media such as radio, television and other newspapers.”

Marketing-related comments were common:

• “Stay connected to our readership, so that they feel that they are the voice of our community.”

• “We are trying to get youth involved in community events so that they will stay to their roots.”

Creative-thinking describes several comments:

• “We are having a more open concept in terms of our content so that we sell our ads more easily.”

• “Trying to be different [in our] approach, and giving the best quality.”

Several respondents commented on a strong work ethic:

• “We have a strong passion to report news to our community, and we do it regardless of losses.”

• “Putting [in] extra hours and working for pennies”

One ninth of respondents did not have a plan:

• “We hold out for the day [for the] economic rebound.”

• “Facing trouble addressing the issue.”

• “We have very limited resources at our disposal, and can do very little to address the situation.”

2.1.3 Internal issues: prompted

Respondents assessed each of nine business issues. The respondents indicated that “financing future growth” (37%) and/or “day-to-day financing” (42%) was “insurmountable” or “very difficult”. “Attracting advertisers” (46%), “retaining advertisers” (39%). “attracting staff” (31%) and/or “retaining staff” (36%) were “insurmountable” or “very difficult” to many respondents. Relatively few saw “attracting readers” (9%) and/or “finding interesting content to publish” (6%) as “insurmountable” or “very difficult”.

2.1.4 External issues: prompted

Respondents were asked to what extent, if at all, 13 external factors would impact their revenue.

Nearly 64% perceived that an “upswing in the economy” would have a positive impact. Conversely, 75% perceived that a “downturn in the economy” would have a negative impact.

“Immigration patterns” were seen as a good thing (positive: 50%, negative: 16%). Perceptions of “second/third generation immigrants” (positive: 43%, negative: 33%) were somewhat split.

Respondents were split in their views of new consumer gadgets: Kindle/e-readers (positive: 19%, negative: 21%) and iPad/tablet PCs (positive: 27%, negative: 21%), and about the aging population (positive: 29%, negative: 32%). Perceptions of Facebook (positive: 46%, negative: 19%), Twitter (positive: 36%, negative: 22%) and on-line news (positive: 42%, negative: 32%) tended to be more positive than negative. Mainstream media (positive: 21%, negative: 36%) was seen as less positive than social media.

2.2 Expected changes in ethnic media

Next, let us consider anticipated changes in the ethnic media industry.

The following open-ended question was posed to respondents, “What changes, if any, do you expect to see in the ethnic media industry within the next three years?” (Appendix 3).

Some comments were a wish rather than a prediction. “Survival of the fittest” was a common response:

• “Our target market can shrink because of online media outlets. With limited resources, keeping up with this growing challenge is very [imminent].”

• “I don’t see any better hope. Our ethnic media will be dead if the issue is not properly resolved.”

• “More players, leading to M&As …”

Government involvement was another common issue:

• “We hope the government officials give the right business support to ethnic media if it wants to keep the multiculturalism in Canada.”

• “The so-called ‘ethnic media’ must be treated equally to the mainstream media in receiving financial assistance from governments.”

Changing demographics was perceived as a blow to some respondents and an opportunity to others:

• “As the current generation ages and dies, there will be less need for ethnic media as the newer generations integrate more with the Canadian community.”

• “Ethnic media is a growing industry in terms of audience and with the advancement of technology digital media is bound to grow in leaps and bounds with the YouTube generation.”

Similarly, the Internet was perceived either as an opportunity or an obstacle:

• “It would be nice to make some money from having the newspaper on the web, but I haven’t seen any way to do that yet ... People’s willingness to pay a subscription to the paper has declined ... successfully (till recently) been offsetting that loss in income with advertising [to enable] readers to pick-up the paper for free.”

• “More community newspapers will be online.”

A few comments focused on industry growth:

• “I expect that ethnic media will be more important in the next three to five years.”

• “The ethnic media will grow stronger and stronger. It will become the new mainstream media.”

2.3 Company profile

This section of the report considers the make-up of businesses in the ethnic media industry. We will consider business ownership, location, revenue, senior executives, staff, expense type and whether succession plans are in place.

2.3.1 Business Ownership

Respondents were asked, “Which of the following best describes the ownership of your company?”

The most common business types were “a Canadian-controlled private corporation” (18%) and “sole proprietorship” (23%). Partnerships accounted for one fifth of responses (non-family: 14%, family members: 8%). 3% reported “corporation controlled by a Canadian corporation”. One respondent stated “Canadian – public corporation”. “Joint venture was almost ten percent (9.6%). “Other” responses were “community” and “society” (1%).

As a cross-check, respondents were asked, “Is your company owned by another company?” 0.4% answered “yes”; however, 24% “don’t know”.

2.3.2 Business Location

2.3.2.1 Office Space

25% of respondents reported that they “work from home”. 30% used “serviced office space (i.e. receptionist, fax machine)”, 23% a “virtual office”, 30% “Commercial office space” and 1.4%.

2.3.2.2 Geography

Respondents were asked, “What is the primary location of your business?”. They were presented with a list of 32 city centres. Some people gave more than one response. “Toronto” topped the list at 32%, “Vancouver” (7%) and “Montreal” (5%) were a distant second and third. “Calgary” (3%) and “Edmonton” (2%) were fourth and fifth.

2.3.3 Business Formation

The data suggest that business formation was fairly uniform over time. Nearly 18% were formed “2008 to present”, 34% reported that their business was formed in “2002 to 2007”, 16% were formed “prior to 1986” (1986 to 1995: 13%, 1996 to 2011: 19%).

2.3.4 Business Size

2.3.4.1 Gross revenue

In 2010, 62% companies had gross revenue of less than \$500,000, according to respondents. 31% of respondents reported gross revenue of less than \$50,000. 3% exceeded Canada’s definition of a small business; they reported at least \$5 million in gross revenue.

In addition, respondents were asked, “To what extent, if at all, did your 2010 revenue increase or decrease relative to 2009?”. 33% reported at least some increase; 16% reported an increase of at least 20 %. 29% reported a decrease in revenue. 8% of respondents reported a decrease of least 20 %. 38% reported no change.

They were also asked, “To what extent, if at all, do you project you 2011 revenue to increase or decrease relative to 2010?” 43% projected at least some increase; 17 % anticipated an increase of at least 20 %. 26% expected a decrease in revenue; 1% anticipated a decrease of least 20 %. 31% expected no change.

Then, they were asked, “Why do you expect to see this change in revenue?”

(Appendix 4).

Comments of those expecting at least a 25 % increase included:

• “If I get the support from the Canadian Periodical Fund to help the magazine with printer costs ... I would probably hire an employee to the sales department to help me grow the sales.”

• “We improved our magazine.”

Among those who expected no change in revenue, comments included:

• “Because we do not have funding or strong support ... to make anything better …”

• “Increasing competition for advertising revenue from the big players like Rogers and Toronto Star, and steady decline in government advertising revenue.”

Comments of those expecting a slight decrease included:

• “More competition and aggressive expansion of the mainstream media ….”

• “Because the economy is still [in a] slowdown …”

2.3.4.2 Revenue by type of media

Respondents were asked to breakdown their revenue by type of media.

“Newspaper” (73% average) ranked first. “Magazine” was second (59%). On-line was third (37%); data entries suggest that some respondents separate on-line revenue from their total revenue. “TV” (21%) and “radio” (8%) ranked third and fourth respectively.

- Seven tenths (71%) reported that at least some revenue was generated by “newspaper”.
- One quarter (25%) generated at least some revenue from “magazine”.
- Over one third (36%) cited “on-line” revenue.
- One tenth listed some “TV” (10%) and or “radio” (10%).
- Seven percent (7%) included “other”.

2.3.4.3 Revenue by type of ad & other streams

In addition, respondents were asked to breakdown their revenue by source. “Local advertisements” (70% average) accounted for the largest portion of revenue. “National advertisements” (15%) and “Other operating revenue” (15%) ranked second followed by “Circulation” (11%). “Inserts and flyers” (7%) was the lowest revenue generator, on average.

• The 80th percentile for “national advertisements” was 21 %. That is, eight tenths of respondents reported that 21 percent or less of their revenue was derived from national advertisements.

• The 80th percentiles for “circulation” and “classified advertisements” were both 10%.

• The 80th percentile for “local advertisements” was 90 %.

• “”Inserts and flyers” had an 80th percentile or three %.

2.3.4.4 Local ad revenue by ethnicity

Respondents were asked, “Consider local advertisements. What percentage of local ad revenue, in 2010, came from businesses or organizations controlled by each of the following ethnic categories?”. “Our ethnic target group” (57% average) ranked first. “Majority group” (28%) was second, “Another minority ethnic group” (16%) was third.

• The 80th percentile for “our ethnic target group” was 100 per cent. That is, eight-tenths of respondents reported that all of their local ad revenue was derived from businesses/organizations controlled by members of the primary target market.

• The 80th percentile for “majority group” was 34 %.

• “Another minority group” had an 80th percentile of 10 %.

2.3.5 Employees

2.3.5.1 Number of employees

“Including yourself, how many people are employed full-time by your company?”

The vast majority (93%) reported nine or fewer full-time employees. 17% have no full-time person, 20% have one, 16% have two to four, and 21% have five to nine.

2.3.5.2 Change in the number of employees

Respondents were asked, “To what extent, if at all, has the number of full-time employees increased or decreased from the previous 12 months?”. 32% reported “no change”. 40% indicated a reduction in the number of employees. 28% reported an increase.

Then, respondents were asked, “To what extent, if at all, do you expect the number of full-time employees to increase or decrease within the next 12 months?”. Employment gain, as compared to preceding 12 months, increased to 30 %; “no change” (30%) was in equal proportion. 13% expected loss to remain constant. Then they were asked, “Why do you expect to see this change in full-time staff?”

Comments of those who expect an increase in staff included (Appendix 5):

• “We expect to grow and hire more staff.”

• “Expand the company.”

Comments of those expecting no change in staff included:

• “[It’s] Difficult to attract full-time staff due to the pay package. Once they get experience, they would like to move to a better job/career.”

• “More revenue by ads [is] required to change this.”

A respondent who expected a slight decrease in staff commented:

• “More tightened conditions to operate …”

2.3.5.3 Outsourcing

Respondents were presented with a list of eight job functions: “writing”, “editing”, “sales and marketing”, “distribution”, “legal”, “accounting” and “office administration”. For each job function, they estimated the proportion of work that is outsourced. The vast majority (87%) reported that they outsourced.

The proportion of organizations that outsourced at least some of a given job function was: writing (88%), editing (75%), distribution (67%), production (51%), sales and marketing (75%), accounting (31%), legal (28%) and office administration (33%).

Let us consider the incidence of at least 50 % of a given function being outsourced: distribution (23% of organizations), writing (20%), accounting (19%), production (16%), legal (14%), editing (12%), sales and marketing (12%) and office administration (6%).

2.3.6 Senior Executives

2.3.6.1 Ultimate Decision-Maker

Respondents were asked, "Who is the ultimate business-decision maker in your company?" 40% stated "publisher". "Editor" was a distant second (24%). "Other" responses were "director/board of directors" (4%), "president" (2%), "me" (1%) and "executive producer" (1%).

2.3.6.2 Age: Senior Executives

Respondents provided the age category of their organization's youngest and oldest executive. On average, the oldest executive was 53 years old. 42% of organizations, the oldest executive is 55 years of age or older. Only 4% reported that their oldest executive was less than 35 years of age.

The average age of the youngest executive was 37. In 44% of organizations, the youngest executive is under the age 35. 8% reported 55 years of age or older.

2.3.6.3 Succession Planning

Given that the risk of morbidity and mortality increases with age, respondents were asked, "Does your company have a succession plan in the event that a senior executive falls ill, passes away or leaves the company?" Balance is noted between "no plan" (38%) and "an informal plan" (41%). 20% had a "written plan".

2.3.6.4 Ethnicity: Senior Executives

Respondents indicated the percentage of senior executives in each of three ethnic categories. Across organizations the mix was "our ethnic target group" (67% average), "majority group" (40%), "another ethnic minority group" (31%).

• The 40th percentile for "our own ethnic target group" was 86. That is, four tenths of organizations had "our ethnic target group" represented by 86 percent or less senior executives. The 50th percentile was 100.

2.3.7 Expenses

Respondents were asked to breakdown expenses into eleven categories. “Product production” accounted for over one-fifth (22% average) of total expenses. “Payroll” accounted for one 67% of expenses. “Rent” (44%), “product distribution” (26%), and “automobile” (8%) ranked third, fourth and fifth, respectively. “Marketing” (6%) and “utilities” (5%) were sixth and seventh. “Out-of-town transportation” (2%) and “business entertainment” (2%) and “hotel” (1%) were minimal, overall. “Other” was six percent (6%) on average.

• The 80th percentile for “marketing” was 10 percent. That is, three quarters of respondents reported that marketing accounts for 10 percent or less of total expenses.

• The 80th percentiles for “payroll”, “product production” and “product distribution” and “rent” were 39 percent, 44 percent, 18 percent and 18 percent, respectively.

2.4 Publication Content

Let us now consider media content, as reported by respondents.

2.4.1 Sources of Content

Respondents estimated percentage breakdown of content obtained from Canadian and international sources. Across respondents, 63 % of content is derived from Canadian sources.

• The median for Canadian sources was 70 %.

• The 75th and 90th percentiles were 80 % and 90 %, respectively.

2.4.2 Type of Content

In addition, respondents provided a breakdown of their publication’s content. In general, content is evenly distributed across “local news” (average: 42%). “national news” (20%) and “international news” (16%). “Entertainment” accounts for 10%. “Business”, sports” and “lifestyle” each comprise about 5% of a publication. “Other” content was 7 %.

• The 75th percentiles for “local news”, “national news” and “international news” were 30 percent, 29 percent and 25 percent, respectively.

2.4.3 Language

Respondents were asked, “In which of the following languages do you publish?” Respondents could select more than one language. “English” (52%) was the top response followed by Hindi (12%). French ranked third (6%). however Greek, Persian, Tamil and Urdu each ranked at 5% for a 20% representation Persian (6%) ranked third and fourth, respectively. “Urdu” was listed by five percent (5%) of respondents. Other languages were cited by less 12% of respondents. Five of the 11 respondents who selected “French” were from Montreal. Three were from Vancouver. Two were from the Greater Toronto Area. The other respondent was from Calgary.

2.5 Distribution

The vast majority reported that they had an average weekly circulation, within the past 12 months, of 1,000 to 50,000. Over half (56%) had less than 10,000.

Under 1,000 36%

1,000 to 2,499 6%

5,000 to 9,999 14%

10,000 to 24,999 14%

25,000 to 49,999 11%

50,000 & over 19%

2.5.1 Distribution channels

Respondents were asked where their publication is distributed. “On-line, free” (34%) was much more likely than “on-line, paid” (8%). “Ethnic stores and restaurants, free” (42%) was ranked higher than “ethnic stores and restaurants, paid” (18%). “Newsstand, free” (19%) was less than “newsstand, paid” (26%). “Office delivery, free” (19%) was less likely than “office delivery, paid”(26%). “Home delivery, free” (19%) was less than “home delivery, paid” (26%). “Libraries” (23%) and “schools/colleges/universities, free” (20%) were balanced. Hotels were least often cited (hotel convenience store, free: 10%, hotel convenience store, paid: 5%, guest room: (7%).

2.5.2 Distribution method

In addition, respondents were asked how hard copies are distributed; they could give more than one response. Less than half reported that the delivery to “stores and/or restaurants” (43%) and/or to “homes and/or office” (44%) was organized in-house. 28% used “a distribution company to bundle and ship to stores and/or restaurants” 16% used “a distribution company for home and/or office delivery”.

Two respondents reported that their publication has only electronic distribution. Three respondents indicated that they work in radio or television. One respondent’s “other” response suggests freelance photography.

• 8% reported that home/office delivery was both prepared in-house and used a distribution company.

• 11% reported that store/restaurant delivery was both prepared in-house and used a distribution company.

2.5.3 Market area

In terms of geographical distribution, two-thirds (average: 65%) cited “the city/town where we publish”. “Other parts of the region” (22%), “other parts of the province” (12%) and “other provinces” (9%) ranked a distant second, third and fourth. One-tenth was accounted by the United States (neighbouring states: 5%, other states: 5%), with “homeland of our primary target market” at 21% and “other countries” at 6%.

2.6 Consumer Profile

Let us now consider the consumer of ethnic media, as perceived by respondents.

2.6.1 Readership Survey

Over half (54%) of respondents reported that their organization surveyed and profiled their readers within the past three years. 46% reported that their organization had never conducted a readership survey.

2.6.2 Demographic profile: consumer

80% respondents reported that they target both males and females.

People “under 18 years of age” (11%). “18 to 24 year olds” (44%) and those aged “75 or older” (22%) were less likely than other groups to be targeted. Nearly 17% selected only one age group. “45 to 54” (44%) was the most frequent single-cohort response.

In terms of household income, “$20 to $39K” was targeted by 81% of those respondents who answered the question. Over half of respondents targeted income groups over $40,000. 10% targeted households earning under $20,000. Given the low participation in this question, one might conclude that income is not a critical variable in marketing their product.

Respondents were just as likely to target people who came to Canada “prior to 1986” (57%) as “2008 to present” (61%). In general, respondents cited “third/fourth generation” less often (35%) than other immigrant groups.

• 10% focused on immigrants who have been in Canada 10 years or more.

• Only one focused on new immigrants and those born in Canada.

Respondents were asked, “What is the mother tongue of your primary target market?”; they could select more than one language. “English” (43%) was the top response; this finding was consistent with an on-line list of languages spoken in each country represented in this survey (www.infoplease.com).

Asian languages captured the next six spots; this reflects that two fifths of survey respondents reported that they were born in Asia. “Urdu” (11%) ranked second. “Tamil” (9%) and “Hindi” were third and fourth. “Cantonese” (4%),“Mandarin” (4%) and“Tagalog” (4%) tied.

2.6.3 Catalyst to read

An ethnic publication will experience natural attrition in its readership base due to mortality, and possibly due to the assimilation of second and third generation immigrants into mainstream society. While new readers are required, a commonly held belief in society is that the younger generation is much less interested in reading than their elders.

Hence, respondents were asked, “From your perspective. How can young adults be enticed to read” (Appendix 6).

The most frequent suggestion was relevant content:

• “Articles about them or their peers ….”

• “Give them what the mainstream media is giving them ... do care about what is happening back home, nor do they read in their mother tongue. They are not our market, but we need them in order to keep refilling readers who pass on.”

• “Give space in the magazine, and let them be in-charge of that particular page.”

A common suggestion was “English” content:

• “Young readers read the paper if we publish in English and topics related to their problems.”

• “Showcase all materials in English.”

Other content-related comments included:

• “Strong articles and unbiased reporting …”

• “By making it positive and fun; but also providing serious information without discretion and censorship because everyone likes to know what is going on in their world …”

A few respondents reflected on cultural and family influences:

• “[It] starts at home with the reading of books.”

• “People who are connected with their culture read our publication from cover to cover.”

Social media was also mentioned:

• Social media updates with cross-reference to [the] web site is important. Also reaching out with issues and items directly related to their lifestyle.”

• “Create a web site for our publication ... attract young adults [with interactive tools] such as ESL [English as a second language] ... could find interesting stuff in our weekly on-line newspaper so advertisers would like to put more ads.”

2.7 Respondent Profile

Earlier, we examined senior executives and staff. Let us now consider the survey respondents. In many instances, the respondent is the company as he or she is a sole proprietor.

2.7.1 Job title

Respondents were asked, “What is your job title? If you have more than one role, select up to three that most apply”. 60% provided more than one job title. 26% listed “publisher”. 19% listed “editor” and/or “owner” (19%). “Senior editor” (19%), “journalist” (12%), “photographer” (9%) each accounted for other multiple job title responses.

2.7.2 Age

38% reported that they are 35 to 64 years old, 35 to 44: 20%, 45 to 54: 18%, 55 to 64: 10%); the average age was 52. 8% were 65 years of age or older. 24% were 25 to 34. Nobody was under the age 25.

2.7.3 Entry to Canada

Only 3% of respondents were born in Canada. 14.2% immigrated within the past 10 years. Among those who have been in Canada 10 years or more, the group “prior to 1986” (32%) was a bit larger than “1986 to 1996” (25%) and “1996 to “2001” (24%).

Then respondents were asked, “Which of the following best describes your landing status when you arrived in Canada?” “Economic class, skilled worker” (37%) ranked first; it was followed by “family class, sponsored by a family member” (21%), “refugee” (14%) and “student” (2%). “Other” (11%) included the old term of “landed immigrant” (3%), as well as “political asylum”, “working permit” and “ordinary immigrant”.

2.7.4 Birthplace

Respondents provided the country of their birth. The data were summarized according to the United Nations Country Grouping. Asia (44%) ranked first. EU (17%) was second; other parts of Europe were an additional six percent (6%). Middle East was third (13%). East Africa (8%) was fourth. Canada was six percent (6%). South America (3%). Caribbean (2%) and Central America (1%) comprised the remainder of the sample.

2.7.5 Household Size & Composition

The average household size was 3.4. 25% reported “two (me and one other person)”. Three and four-person households were reported by 30% and 20% of respondents respectively. 13% reported that they “live alone”. One-fifth reported households consisting of five or more people.

In addition, respondents were asked about their relationship to other members of their household. Less than half (44%) listed “my spouse”. 23% included “my children under the age 18”. 25% included “my grown unmarried children 18 years of age or older”. 25%) included “my parents”. “My grown married child and their spouse” and/or “my grown unmarried brother/sister” was listed by 4%. Other relationships were each mentioned by 2% or less.

2.7.6 Education: Respondent

66% reported that they have completed at least one university degree; this is significantly higher than the 2006 national figure (24%) generated by Statistics Canada. 15% were less likely than the national (25%) to hold a college diploma. Only 2% reported high school or less (national: 48%).

2.7.7 Personal Income: Respondent

2.7.7.1 Employment Income: Personal

Respondents were asked to report their 2010 personal employment income from all sources, excluding investments and government subsidies, before taxes. 20% reported personal employment income of $60,000 or more; there is no significant difference with the 2009 national estimate by Statistics Canada (20%). The proportion of respondents who reported less than $20,000 (22%) was significantly less than the 2009 national figure (40%).

2.7.7.2 Employment Income: Household

In addition, respondents were asked to report 2010 employment income before taxes that was generated by all members of their household. There was no significant difference in the proportion of respondents in each income category relative to the 2009 national estimate by Statistics Canada.

2.7.7.3 Employment income from ethnic media

In addition, respondents were asked what portion of their 2010 personal employment income was generated by their job in ethnic media. 43% reported that they "do not earn money from my work in ethnic media". One quarter reported 75 percent or more of their employment income is generated through their work in ethnic media (75 to 99: 14%, 100: 12%). The average was 19%.

2.7.7.4 Other Paid Employment

Respondents were asked, "Aside from your work in ethnic media, what other paid jobs do you currently have to earn an income?" 27% reported "I do not have any other paid jobs". 11% were in "sales"; an additional 13% listed sales-related jobs under "other" (e.g. insurance, real estate, mortgage agent). "Skilled labourer" accounted for 8%. Professionals such as doctors and teachers comprised another 16%. "Other" responses included "investor", "property manager" "school bus driver", "pensioner", "translator", "journal editor", "business consultant", "office worker", "health care worker", "restaurant owner", "dance school operator" and "artist".

3 Recommendations

The findings of this research lead to several recommendations:

• **Provide members with training in business management, marketing, creative problem-solving, leadership and succession planning.**

- The data suggest that many members do not have a formal plan to operate, develop and sustain their business.
- And, there is no plan to replace the current leader(s) in the event morbidity or mortality.

• **Look for synergy with other members.**

- Half of respondents indicated that their organization had never conducted a reader/viewer survey.
- To understand perceptions and attitudes of current and potential users, focus groups and a quantitative survey should be developed and implemented. The same questionnaire should be used by all member-organizations, and data should be analyzed by the same research team to ensure consistency.
- Given that many members operate very small business and the importance of ethnic media to Canada, the survey should be funded by government or corporate sponsor(s).

• **Widen revenue bases.**

- The base of advertisers could be widened to the larger local community and to national advertisers by pooling salesperson-resources to sell ad space in multiple publications simultaneously, "Your ad will reach XXX,000 consumers of ethnic media".
- A model would need to be developed, to include sales incentives, key message to attract potential advertisers and revenue sharing.
- Likewise, some other job functions and resources could be pooled. e.g. Securing lower prices at a print shop by using split-runs to print more than one publication (i.e. economies of scale across distribution, web site design)

• **Establish interactive forums for members to share best practices.**

- For example, some members perceived social media as an opportunity whereas others saw it as the death knell.
- At least twice a year, members should assemble for brainstorming sessions to generate ideas and to establish a common set of plans.

• **Look for ways to capture the attention of young adults.**

- As existing consumers of ethnic media grow old and die, their children and grandchild are needed to sustain the media outlet.

- Run focus groups, with young adults representing different ethnic groups, to generate ideas.
- Work with journalism schools to bring in young writers – provide them with a financial incentive to continue working with the publication after graduation.
- Work with the ESL departments of colleges to expose newcomers to the media source.

Many respondents commented that they lack financial resources. Training programs and synergy, as suggested above, will go a long way to streamline process.

Still, government subsidies are required to fill the gaps.

To paraphrase one respondent, **'*ethnic media is the voice of Canada'.***

Canadian Discussions

Community

Through this report the influences of globalization and diaspora on Canadian immigration, settlement and culture have been observed. The emergence of new multicultural, multilingual Canadian television channels and digital media make an expanded world of interactive intercultural communication horizons and access available to most Canadians. Recent Canadian and international ethnic media studies have been reviewed to better position thought on the NEPMCC study.

But what does the Canadian public think about our third language media? What are the public's third language readership and viewership preferences? Are those preferences determined by and do they differ across demographics such as age? Do Canadians who do not speak or understand a third language have opinions about Canada's third language media? If so, what are those opinions?

During December 2011 the author conducted independent mall and street surveys in the Greater Toronto Area (GTA) and surrounding area to survey Canadian residents and citizens about their third language media habits and impressions.

Ten interview locations were drawn randomly out of a possible pool of thirty locations that represent a sampling of concentrations of Canada's cultural and third language diversity.

15 young adults (ages 18-25) and 15 mature adults (age 40+) who speak or understand a third language were surveyed at each location.
The random survey locations and cultural diversity concentration representations are:

Location	Cultural Diversity Concentration Representation
Danforth Ave. & Logan Ave.	Greek
Dundas St. W. & Ossington Ave.	Portuguese
Eglinton West	West Indian
Gerrard St. East & Greenwood Ave.	Afghan, Bangladeshi, Indian, Pakistani
Lawrence Plaza	Jewish
Pacific Mall	Asian and South-East Asian
Roncesvalles Village	Polish
Sherway Gardens Mall	Mixed
Woodbridge Mall	Italian
Yonge St. north of Finch Ave.	Iranian

Survey questions were the same for all locations and both age groups. They are:

1. Do you speak and/or understand a third language? This means a language other than English and French, Canada's official languages.

If the respondent answered 'yes' they were asked to respond to questions 2 through 17.

If the respondent answered 'no', they were asked the question, "Do you have any observations on or comments about the importance of Canada's third language media?"

2. Do you read Canadian newspapers, magazines and/or periodicals in a third language?
3. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Canadian newspapers, magazines and periodicals to you and your life in Canada.
4. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Canadian newspapers, magazines and periodicals to your culture.
5. Do you listen to Canadian radio in a third language?
6. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Canadian radio to you and your life in Canada.
7. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Canadian radio to your culture.

8. Do you watch Canadian television broadcasted in a third language?
9. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Canadian television broadcasting to you and your life in Canada.
10. On a scale of 1-5. 1 being not important and 5 being very important rank the importance of third language Canadian television broadcasting to your culture.
11. Do you use the Internet, and/or social media, and/or texting in a third language?
12. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Internet, and/or social media, and/or texting to you and your life in Canada?
13. On a scale of 1-5, 1 being not important and 5 being very important rank the importance of third language Internet, and/or social media, and/or texting to your culture.
14. In order of preference, 1 being highest and 4 being lowest, rank your personal Canadian third language media preferences; newspapers, magazines and periodicals as one group, radio, television and the Internet, social media and texting as one group. If you have two or more media that you prefer equally you can rank them the together.
15. Which Canadian third language medium is most important to you for your source of news in your homeland?
16. Which Canadian third language medium is most important to you for your source of information for news in Canada?
17. Which Canadian third language medium is most important to you for information about life and living in Canada, Canadian culture, immigration, politics and community programs?

The survey findings show that location geography and predominant ethnicity at that location were not significant factors in a respondent's willingness to disclose their age group or participate in the survey.

The subject of Canadian third language media was of very strong interest to over 89% of those surveyed. The degree of English comprehension did vary geographically, being lower in those locations where heavy Canadian immigrant traffic was present and higher in those locations with mixed ethnicity present.

523 respondents were surveyed. 300 or over 57% either spoke and/or understood a third language.

Of the 223 respondents that did not speak and/or understand a third language, the distribution was highest at the Eglinton West and Sherway Gardens locations. Of this group 168 or over 75% volunteered observations and/or comments on the importance of Canada's third language media.

140 respondents or over 83% stated that third language media is either important or very important to Canadian culture and identity. 38 respondents observed that third language media is emerging as the mainstream or dominant media in Canada. Only

eight respondents or 1.53% of total respondents declined to comment. There were zero negative comments or observations.

Of note are the following respondents' observations from the group who did not speak or understand a third language;

"Our family is finally learning Italian. We sit with *Nona* (grandmother) and watch CHIN-TV. They have one commentator in Italian and one in English discussing the topic together. That way we learn Italian and my grandmother can practise her English. We do it all together. It brings the generations closer together and preserves our culture."

"I picked up the Chinese newspaper and got the best deal on a flight to Beijing. I couldn't read the language but the price was obvious. I couldn't have gotten that price anywhere else."

"I love the Bollywood movies on OMNI. I'm learning how to do the dances and went to an Indian sari store that was advertising on the channel to buy an outfit. The people there were so nice and we've become great friends."

"Canada's third language media help me to understand our newcomers and to be a better Canadian."

Following are the results from the 300 respondents that completed the full survey. Although the survey is a random urban sampling limited by its size, survey questions and focus on two demographic groups (18-25 and 40+) it does establish the need for deeper more comprehensive national research in support of third language speaking Canadians and the ethnic media that serve this audience.

150 respondents were age 18-25; 60% female, 40% male. At the '5' or very important level this group demonstrated an averaged 39% third language Internet/social networking/texting media preference with little if any media preference differences between female and male respondents. Television (32%). radio (20%) and newspapers/magazines/periodicals (9%) ranked 2nd, 3rd and 4th in their media preferences. Asian, Indian and Jewish males demonstrated a marginal preference over other groups for newspapers/magazines/periodicals. Canadian content in the Internet/social networking/texting medium was not determined.

This category may also contain content that is categorized Internet radio which would be reflected in a lower preference in the traditional radio media category. Consistently across all groups third language Canadian newspapers/magazines/periodicals were ranked important to very important to the respondents' lives in Canada and their respective culture but not ranked highest as their medium of preference.

Contributing factors to this difference may include the immediacy and interactivity of digital media and readership of online third language newspapers by this demographic group. Canadian third language radio and television broadcasting media were both ranked very high in importance to culture but only moderate to moderate-high to self and life in Canada.

From a Canadian intercultural social integration perspective the global nature of Internet/social networking/texting media sources for this demographic group may reinforce homeland identification while creating excessive competition for Canadian third language media. Canadian third language television was ranked most important for both homeland and Canadian news.

Canadian third language newspapers specifically were ranked most important to this young adult group for information about life and living in Canada, Canadian culture, immigration, politics and community programs.

Correlating this survey's findings on the 18-25 demographic group with the NEPMCC Survey recommendations it is important that Canada's ethnic press in particular and third language media in general find innovative and sustainable ways and the necessary support required to attract and communicate with this dynamic globalized audience of Canadians.

As one respondent suggested, "Why don't you put your survey up on Facebook and go viral?" The suggestion had certain merit, but the main advantage to conducting a survey in person is the great opportunity to establish face to face communication within the context of building Canadian communities.

The 150 age 40+ respondents surveyed were 68% female and 32% male. As one respondent stated, "My husband is at home reading the Chinese newspaper while he waits for the Taiwanese news broadcast on TV." This survey demographic collectively ranked Canadian third language newspapers/magazines/periodicals and Canadian third language television broadcasting at '5', very important in terms of their lives in Canada and their culture with a score of 36% and 36% respectively for each medium. Canadian third language radio followed at 20% and the Internet/social networking/texting at 8% as being very important.

Several respondents commented that they are using the Internet daily and started social networking and texting over the past 18 months. Canadian third language newspapers specifically and television were ranked most important regarding homeland news. Canadian third language radio and television broadcasting were ranked highest in importance as the media of choice for news about Canada. 87% of the survey group ranked Canadian third language newspapers, magazines and periodicals '5' or most important for information about life and living in Canada, Canadian culture, immigration, politics and community programs.

Of the 150 respondents in this group 78 made comments either after individual survey questions the or following the survey. Multiple comments of a similar nature and to paraphrase include;

"We need more free newspapers in our language."

"Our third language newspaper is how I find out about Canada and how to be a good Canadian."

"Canadian third language media let me know where our community events are."

"I also watch some of the other programs in different languages. It brings all of us newcomers together as Canadians."

"We need more TV programming in my own language with a crawl in English on the screen so I can learn English better."

“Newspapers and TV in my language have homeland news stories that are not carried in the English media. This way Canada can find out about issues abroad like politics and social injustice elsewhere in the world.”

“This is how my children and grandchildren keep our culture and language alive.”

“Canada’s third language media is who we are as Canadians. It is all of the aspects of us all together as Canadians. We need more.”

While the above are highlights from the December 2011 GTA mall and street surveys of two different demographic age groups, both those who use Canadian third language media and those who do not speak or understand a third language resonate with a clear, consistent voice.

In summary:

- Canadian third language media are a central, necessary part of Canadian being, community, identity, culture and intercultural understanding.
- Canadian third language press and particularly Canadian third language newspapers are the trusted media source for both national and international journalistic reporting and information about life and living in Canada, Canadian culture, immigration, politics and community programs.
- Canadian third language media are uniformly regarded with strong public feelings that identify with both homeland heritage and the development of Canadian heritage.
- Canadian third language media presence should be expanded and supported in a competitive media marketplace.

From a research perspective it is recommended that a formalized national study be commissioned on community views on both Canada’s third language media and Canada’s third language press and media industry requirements to effectively and interactively communicate with their target and intercultural groups in support of diversity in the challenges and opportunities that media convergence, emergence and viability present.

The NEPMCC Survey of the membership of the Ethnic Press and Media Council of Canada clearly demonstrates the need for the Government of Canada to consider the socio-economic conditions of those individuals who are involved in third language media production. This consensus of industry need further demonstrated by the voice of Canadians for Canadian third language media industry support constitute the foundation for national study to determine what is required to equitably foster a vibrant third language media culture in Canada in both commercial and public access contexts.

Leader Views

Through November and December 2011 18 key Canadian leaders from the advertising, broadcast, press, public relations and social research industries were invited to provide SWOT analyses on Canada’s third language media industry. Following are their top three expressed strengths, weaknesses, opportunities and threats for each category.

Strengths	Weaknesses
Captive immigrant audiences	Poor financing/cash flow
Grass-roots community ‘know-how’	Undefined strategic vision & action plan
National socio-cultural capital and currency	Weak business skills among small players

Opportunities	Threats
Professional skills development	Asian domination of the ethnic broadcast segment
Partnering with mainstream media	Failure to partner with mainstream media
Profitably leveraging ‘know how’ through e-media and ethnic marketing	Mobilization of large players from within

Portrait of an Ethnic Media Pioneering Family

Following is the history of the Kapsalis family, Canadian ethnic radio pioneers, related in their own words:

“In 1959, Dean and Fotini Kapsalis began the first Greek radio program in Toronto. In those years, the composition of Toronto was changing with the significant immigrant populations that were making a new life for themselves and their families. Dean and Fotini were themselves immigrants from Greece who had arrived in Toronto in 1956.

Like most trailblazers, the road to success was a challenging path that required a commitment of time, money and considerable sacrifices. Neither Dean nor Fotini had prior experience in radio. They first started working out of a radio studio in the Town of Richmond Hill that, at the time, was an hour-long commute each way from the Downtown Toronto area they lived in. The station charged $40.00 per week for 1 hour of air time. Dean and Fotini had to maintain regular day jobs, other than the radio station, to support the operating costs of the radio program and their young family.

Dean quickly learned how to operate the equipment to produce the program and Fotini, along with Dean, became a radio announcer. It took a few years before the radio program was able to break even and eventually generated a net profit.

By the 1960s, the Greek Community was beginning to grow and there were many new Greek businesses that wanted to attract Greek customers through advertising. During the evenings, Dean sold advertising to local Greek businesses.

They started the radio program because they wanted to help and support the newly developing Greek Community stay connected to their cultural roots. Dean drove to Toronto Pearson Airport every week to greet the passengers arriving from Greece and pick up a delivery of the most up to date Greek music and a weekly bundle of National Greek papers. They kept the community current by playing current Greek music and reporting on the news direct from Greece. They also reported on local domestic news, entertainment, sports, and made local public announcements for social gatherings, engagements, weddings, births, and deaths within the community.

Producing the weekly radio show took an extraordinary amount of time and dedication. They translated national and domestic news from English to Greek and they summarized the weekly Greek papers to report on news from the homeland. The highlight of the show was always the live on-air interviews with key politicians, sports announcers and entertainers, which in those days was very special as the costs were high and the telephone communications technology not as reliable as today.

Dean and Fotini were able to share, with their listeners, the experience of leaving their families, their home country, coming to a new land, not speaking the English language and feeling frightened and alone in a strange land. While at the same time, they helped the community put shape around shared dreams of building a home in a new country filled with opportunity for a better future for themselves and their children.

The Greek radio program provided Dean and Fotini the opportunity to positively support the transition of Greek immigrants into Canada. It helped provide information to educate listeners on how to live in this new country and adjust to the cultural patterns of the western norms. The radio program brought listeners together that shared a common history filled with traditions, music, language, and common ways of thinking.

As President of the Ladies Philanthropic Auxiliary of St. Demetrios Greek Orthodox Church, Fotini used the Greek Radio Program to create awareness and raise charitable funds for social causes within the community, promoted social and cultural events, encouraged listeners to participate in English language programs, and helped to develop Greek after school language programs for children.

Dean and Fotini shared their own family stories with their listeners and encouraged individuals and their families to adapt to the diverse multicultural population of Canada. Over the 20 years of the Greek Radio programs' history, Dean and Fotini were truly innovative in developing a grassroots solution to address the real societal needs of the day.

By 1979, radio stations across the country had begun changing their business models. It was no longer financially viable to continue to deliver the Greek Radio Program in the manner in which Dean and Fotini had nurtured and developed over the years. It was a sad day for many in the Greek Community when the last show of the Greek Radio Program aired. To this day, individuals recall the joy that they felt when they tuned in to hear the warm and welcoming opening remarks of Dean and Fotini Kapsalis."

Recommendations

The dynamics of global change and its influences that affect Canada's entire media industry are multidimensional and complex; at once cultural, societal, economic and driven by diversity, innovation, multiculturalism and sustainability.

Through this report a framework for thought, listening, open discussion and collaboration has hopefully been created. Recommendations have been made in the NEPMCC Survey for the National Ethnic Press and Media Council of Canada and in the Executive Summary of this report.

It's all about doing the right thing together, to be best of our abilities at all times, for Canada.

Your communication is invited.

Acknowledgements

Acknowledgement is first extended to the Department of Canadian Heritage, Government of Canada for its support, and to the members of the National Ethnic Press and Media Council of Canada (NEPMCC) whose vision, sacrifice and daily perseverance make Canada's third language media open, accessible and available to the world. Thank you.

To Mr. Thomas Saras, NEPMCC President and Chief Executive Officer, humble thanks for your exemplary inspiration, tireless belief, dedication, guidance and wisdom in support of uniting Canadian communities, culture and society through vibrant third language communication.

This report owes much also to the contributions of Seneca College's Angela Zigras, Academic Chair, School of International Business and School of Tourism and Professor James Davidson who designed and the NEPMCC Survey questions and analyzed respondent results.

To the social researchers who promote understanding between all peoples, acknowledgment and gratitude are extended in academic collegiality.

To Dean and Fotini Kapsalis, pioneers in modern multicultural radio in Canada, thank you for sharing your family experiences and for greeting plane loads of newcomers to Canada bearing packages of the 'latest tunes' that encouraged many families sing and dance together with new neighbours in fond remembrance and shared discovery in a new homeland, Canada.

To Professor Maurice W. Platero, Seneca College, School of International Business, your commitment to 'do the right thing at all times for our students', many of who have a language other than English or French as their first language, lead your endorsement of me to write this report. Thank you for this opportunity Maurice.

Finally to those Canadians who took the time to express your valued and valuable thoughts in overwhelming support of our third language media industry your 'one voice' is at the heart of this report and is the heartbeat of Canada's third language media industry.

Appendices

Appendix 1:

NEPMCC Survey

Business Challenges

"At present, what is the biggest challenge faced by your organization? Describe."

The response text of 113 NEPMCC members follows;

"Financing

At the present time the biggest challenge will continue to be financial.

Rising cost of publication and limited revenue from advertisements hardly covers the publication cost.

Lack of financial resources due to low advertisement revenue.

Financing, advertising sales.

Not having enough financial resources to hire additional staff to assist with day-to-day operations. As a small business we are limited in our abilities to expand due to financial constraints. We are also dealing with declining advertising support due to the economic downturn and the 12% HST which has been implemented in BC.

Previously we were only responsible for charging 5% GST.

Financing, gaining more revenue

Finance is the biggest challenge so far, even it is hard to make recoveries from our advertisers on time but at the other hand we have to pay cash to the printer on delivery.

Financial difficulties due to high printing and operation cost. Our newspaper is especially for Sri Lankan and for other South Asian communities. They live all over the Canada .It is very difficult to bear the additional distribution cost.

The biggest challenge face our organization is financial. This limited all production such as circulation of the publication, to hire more staff and the like.

At the moment the biggest challenges my organization is facing is sufficient financing, we have a hard time producing more issues and getting the message out there to more readers because financially we are unable to produce a higher number of issues to reach a larger population.

INCOME TO PAY ALL THE EXPENSES ASSOCIATES WITH THE MAGAZINE.

Meeting financial targets is the biggest challenge faced by our organisation. Because of this we face many difficulties in making proper payments to the contributing writers, recruiting required staff and maintaining the distribution network among others.

TO GENERATE ENOUGH INCOME TO PAY ALL THE ASSOCIATES WITH THE MAGAZINE

Find funds to support and pay all our expenses.

Day to day financing, financing future growth, recruiting new staff

The biggest challenge is to overcome the financial hardship. We face challenges because of lack of staff and relocation of work.

Financial- The day to day operations and the affordability of staff members- graphic designers and professional writers.

Finance. The economy has had an impact on advertisers.

The biggest challenge is funding to sustain a viable media organization. Funding to go to salaries, to operational costs, etc.

Financial, we do not have enough resources to run and publish our monthly news paper

Finances

Financials

Financial pressure,

Cash Flow

Financial Stability

Economics

Finance

Finances

Advertising

Get corporate and government advertisements and run the newspapers financial successfully

The biggest challenge is advertising and thus revenue

Advertising market has gradually become so bad. We cannot get our paper printed without paying cash on delivery but at the other hand our recovery is behind.

Advertising revenue does not meet the escalating costs with the present economic conditions.

Advertising revenue does not meet the escalating costs.

Securing Advertisements to cover the cost of publication

How to get government advertising

Challenges are: a) financial - as advertising revenue is shrinking because of the internet factor it is becoming hard to survive; b) change of time & technological capacity: the way of news gathering is changing and more and more it is becoming internet base; news comes in very fast with massive volume; to survive, one needs to be internet savvy and equipped with upgraded software and equipment; this becomes hard for Ethnic media publishers to accomplish because of their low financial position.

Getting the foot in door to corporate Canada, and once it is trying to keep it, but small size publications who charge very little money but claim huge circulation make it hard for corporate Canada to trust the ethnic media.

The depression in economy has affected us badly. Most businesses or corporations have lowered their advertising/marketing budget.

A decline in advertising as a result of the recession and the continuing fragility of the economy.

Money..

We have to compete for the same advertising dollar amongst many other publishers. The list of publishers are increasing but the advertising budget for corporate and government bodies remain same or in some cases even decreased.

We do not have resources to market ourselves like the Star or the Sun and as a result have very little scope to make publishing a profitable venture

Having enough advertisement.

My Big problem is who to work with big company to get more advertising to cover our expenses

Getting Advertisements

Lack of advertising

Solicitation of advertisements

THE DEBTORS

Lots of organisations book the space and get their advertisements printed however when it comes to clearing the payments there is not only a delay but also DENIALS at times.

Revenue

1. Generating Revenues

2. Gaining access to Corporate Advertisers

3. Information of Ad Agencies

4. Receipt of Government Advertisement

5. Price Maintenance, customers tend to pay lowest rates for placing advertisements

TO GENERATE ENOUGH INCOME TO PAY FOR ALL THE EXPENSES RELATED TO THE MAGAZINE, ESPECIALLY FOR THE PRINTING COSTS. IT´S HARD TO FIND NEW CLIENTS WHO PAY PROPERLY AND TO INCREASE THE SALES.

Generate enough income to pay all the expenses associated with the magazine.

Obtaining paid work

Revenue Generation

Unstable and low revenue.

Canada Post strike (cash-flow)

Less sales.

Funding. Dwindling advertising revenue and competition from new age social media.

Growing Competition and no support from Government and Banking Institutions

No fund from the government

Government assistance

Accessing funds to perform as effectively as I would love to.

We maintain a television program. To date we have had no funding from any organisation. We would appreciate financial assistance to purchase new equipment.

Our main focus is to serve the community by keeping them abreast of local and international news, as well as providing up-to-date information on entertainment and sports.

Growth; same challenges as most businesses - growth, sales, infrastructure technology.

our challenge is to continued preserve the culture and our heritage provided the government issues reaching out to the Greek Community at large.

Spreading our GTA footprint.

Find potential publishers for my stock photos, surviving.

As photographer I capture every activity of the city but it is not easy to sell your photos to a major publication.

Most ethnic paper they can't afford to buy images for their monthly print

Marketing

Marketing, professional development, and cover of daily increased production expenses.

Marketing and promotion.

The biggest challenge we face is economic, advertising downturn and an absolute lack of support in the form of government advertising.

Economy

Economy - Corporate clients are not ready to spend the money. Local business has hard time to meet their expenses.

The economic downturn

The biggest challenge are: the economic slowdown, more people unemployed so less purchasing power.

The need of the listeners to understand the changes in cultural mores, community and continue on with the same zeal in their cultural heritage as their parents. It seems that the melting

pot and globalization moves into a direction of an undesirable uniformity and the young do not care as much in their culture.

Competition

Takeover by bigger corporations like Sun Media Group or Post Group.

We do not have the resources to fight against the big players. Ethnic

Publications that have been taken over by larger corporations have a better chance of survival and thereby kill smaller publications such as ours.

Cost

The biggest challenge faced our organization is the high cost of the printing the paper and no fund from the government

The biggest challenge is the cost of print, cost of distribution and cost of writers' fees

printing cost and payroll

To cope with the increasing printing cost and other overheads.

Our Printing Charges and Distribution expenses are the biggest challenges faced by our organization.

Meeting the cost in Printing, Graphic, Distribution and Marketing

The cost of production has increased over the months, but the revenues have decreased. It is the battle of survival now.

Readership

Decline in readership due to reader mortality (post-war immigration generation) and internet availability for younger readers, also lack of language retention in younger generation.

Published to more readers.

Diminishing numbers

The biggest challenge is our readers could access to news all over the world and they are not depending on weekly news that we deliver every week. The web in fact, takes away most of the newspaper business as readers could easy access to hear news happen everywhere. They don't have to pay or pick up periodicals from certain stalls in the city.

Finding / retaining readership/viewership/listenership

Second Generation and Third Generation Canadians are waning away from the readership and they are the biggest readers right now.

To get new subscribers.

The renewal.

Technology

Our first and foremost problems may be in 1) requiring pieces of technical information in order to function, and 2) renewing our website account on the web and upgrade our website.

Failure to embrace electronic media for advertising as compared to print media.

Online presentation in a new perspective way

Online magazine

People

People and money

Hiring a full time staff and improving the number of events - press conferences to cover

Creating a winning culture - in which every individual and every team is focused on boosting profitability and performance and fulfilment levels while playing for all to win.

We as publishers face numerous challenges when serving to the ethnic minorities. The biggest challenge is lack of trained human resources to compile, edit, and communicate with the community because of limited resources for financing for the annual project.

Victim of social abuse”

Appendix 2:

NEPMCC Survey

Ways to Address Challenges

"How is your company addressing that business challenge?"

The response text of 101 NEPMCC members follows;

"No plan

We hold out for the day to wait for economic rebound

Trying to cope with time

This is the biggest challenge and facing trouble addressing this issue.

Right now we have hard time to support translators in Greek most important Government issues, due luck of revenue.

Due to the reason, our debt is going to be increased by the time.

Plans, but no time to implement

We have limited resources at our disposal and can do very little to address the situation.

Struggling

It is quite a struggle and I am up against a stone wall.

Costs

For the cost of printing, there is no solution.

To cut down the payroll cost, we use more freelance writers instead. We also limits the frequency of attending local events.

We are trying our best to keep our overheads as low as possible that also include working long hours and keeping least number of employees. Our development projects are also going slow.

Consolidate existing markets while taking baby steps in new areas.

Mainly volunteer work by all members.

With poor advertising, we rarely publish.

I have switched to freelance photojournalism

Get more volunteers, try to get more ads

We use volunteers and borrow money. We engage volunteers after spending many hours in training them.

By reducing our production expenses

Reduction of Human resources

Cutting costs

We have been managing because it is one of the oldest newspapers so there is still some support from the business community. We also have to cut many things to survive.

Cutting costs

We cut our expenses, and search for ads aggressively.

Through a combination of borrowing - either directly from a credit line or indirectly by relying on our suppliers' willingness to accept late payments - and cutting back on expenses (downsizing). We are about to embark on direct solicitations to community members to donate funds for the paper's continuation.

Restructuring.

We are reorganizing the operation and we asked the Bank to provide us a loan.

Need to create a rock solid business plan

Need to create credible and compelling financial forecasts and presentations to secure funding from potential investors

We are all bearing costs as we have passion for journalism and the passion to inform our audience

The Editor spends most of his time carrying out all the work; be it editorial, distribution or otherwise. Also well-wishers of the Yathra paper in the community extend their support from time to time in distributing the paper especially at community events. However, due to the shortage of human resources the operational aspect is regularly affected and the Yathra monthly release gets delayed by a couple of days than the planned release date very often.

Advertising

We trying to cover our cost the money collected from the advertising and it's really very tough.

By soliciting more ads and getting more revenue.

Hiring advertising agents. Income on commission is so low and it is hard to find the right person for the job

Deficit is being increases just because of the situation and now we are planning to request advertisers to pay up front but it seems too hard to be implemented.

We're trying to raise revenues from advertising and marketing.

We, as weekly community newspaper soon will set up our own web site to let our readers and advertisers access our publication on our web site, so even they are at home, they could read our newspaper.

Our Company is addressing the Business Challenges by spending more time in meeting people and advertisers.

1. Searching for more Advertisers and sponsors

2. Reduce operation cost by getting help/services from friends and family members

By generating advertising revenues from the community businesses

We are trying to find more sponsors and advertisers daily in order to reach our goal of reaching a higher population.

Trying to be innovative in terms of generating advertising revenues by going online and joining social networking like Facebook.

Soliciting advertising from politicians

By being upfront, letting the client know that they will get these kind of media people calling on them, getting them prepared. Also we do more than just sell them an ad. We work with we educate them and we make the process of doing business with us easy.

We try to cope with the business challenge through advertisement and subscriptions and recruit more volunteers

By working hard to generate more advertising revenue, talking to potential advertisers - and participating at The National Media and Press Council of Canada

Solicit ads from as many businesses as possible that advertise in other media such as radio, television, and other newspapers.

Adjustments of advertising rates to match those of the local competition

Revenue

By trying to increase the revenue.

Posting more information on the internet, however the challenge is generating revenue from that.

I have 3 other jobs that support the community show that I produce, publish 2 extra supplement issues per year and our annual golf tournament is an extremely important source of

revenue.

Currently, we receive some financial funding from advertisements/sponsors. However, this support is minimal and does not meet our needs.

We work on these issues minimizing our revenue up to nothing

Ethical worth of an organisation is something which is difficult to weigh and measure. At times we do ask for advance payments, but we face problems from competitors who do not allow us to do that. However on other occasion the entrepreneurship demands that we as an organisation take the plunge and expose ourselves to the risk.

Pressing the need for all levels of government to support ethnic media.

Work Ethic

We have a passion to report news to our community and we do it regardless of losses.

Bring real work accountabilities into the group

Hard work and investing money to bring the product

Working very hard

Putting extra hours and working for pennies.

We are working hard.

Creativity

Opened mind to more interested people including more volunteers.

Trying to be different in approach and giving best quality

Increasing our readership giving more educational content

THE MAGAZINE HAS GROWN IN THE NUMBER OF PAGES AND THE NUMBER OF ISSUES AS WELL AS BECOMING BILINGUAL

We tried our best to match the conditions as required by corporates or governments.

We try to appeal to young people by introducing changes. Yet some of these changes are resisted by "old timers" who want to change nothing and keep tradition intact.

We are having a more open concept in terms of our content so that we can sale ads more easily.

The magazine has grown in the number of pages, issues as well as becoming bilingual.

Marketing

Marketing, social media networking, enlisting the help of the Ethnic Press Association

Promotions

We developing sales strategies to increase the revenues.

Using or trying several methods to attract new clients.

We are trying to get youth involved in more community events so that they stayed to their roots, besides

Oktoberfest, we are trying to organize other events which symbolizes our tradition and culture.

By creating awareness

We are taking the following steps to address the above-mentioned challenges.

1. Contacting more and more customers

2. Searching to find Ad Agencies

3. Looking for information 'How to Get a Govt. Ad'

4. We offer competitive prices but maintain a reasonable price.

Staying connected to our readership, so that they feel that they are the voice of our community.

We have decided to tap all forms of media to increase our presence

Discounting advertising rates to increase the volume

Increased promotions and special discounts to multiple advertisers.

Expanding the distribution, covering as far east to Oshawa and west to Hamilton, St. Catharines and Cambridge, Ontario.

By organising subscription drives throughout the year, in the summer during Armenian festivals and Christmas

Attracting seniors

Try to contact and develop new business sectors.

Marketing

Phone calls, emails and face to face meetings are used to overcome this business challenge.

Technology

Trying to diversify, including using the use of new technologies.

Investing in new technology and know-how.

Spending more time making personal connections and forcing my company (me) to use emerging communication technologies

Following the new technologies

Adapting to the internet in an increasingly level; find ways to upgrade software and equipment; Looking for retraining ."

Appendix 3:

NEPMCC Survey

Expected Changes in the Ethnic Media Industry

“What changes, if any, do you expect to see in the ethnic media industry within

the next three years?”

The response text of 105 NEPMCC members follows;

“Competition

More publications more competition, lesser and lesser revenue

More outlets, more competition

Expect more competition from the mainstream media as they are aggressively pursuing the ethnic market.

More competition and no support by the government

I see more and more players coming in. I see more price cutting. I see harder times if we do not get our act (together).

Tougher competition in getting ads for the printed version of newspapers, switching more to online version of newspapers

Mainstream

Gaining Access to Corporate Customers to compete with Main Stream Media

Ethnic media will become more mainstream.

In the near future, I expect the ethnic media industry to be more vocal resulting in increased recognition from mainstream media.

1. Greater visibility with main stream business houses.

2. Be more focussed on the issues of immigrants and ethnic groups.

3. To act as viable bridge between the Government, its policies and the masses.

Ethnic media to be treated as the main stream media

We see ethnic media on the whole to be the main media.

Consolidation

More and more media will involve in the meeting and go together for big voice.

Specializing in the niche market and serving only special targeted areas. Industry is saturated with too many small publications.

All established papers going out of business and possibly new scrupulous entrepreneurs trying to fill the void.

I don't see any better hope, our ethnic media industry will be dead if the issue is not properly resolved.

Ethnic media will continue to exist because of Canada's multicultural makeup. Some media will flourish, some will just die.

Online media and new networks are growing. Our target readership can also shrink because of growing online media outlets. News, features and articles from back home are available online. With limited resources keeping up with this growing challenge is very imminent.

Survival for the fittest

More players, leading to M&As.

More takeovers by larger corporations.

Some of the publications will grow and other will disappear.

Demise

Less advertising from government.

More ethnic media publications will close down.

More will go into electronic publishing.

Ethnic media will be existing but income will drop dramatically

I hope bureaucrats at least give and respect our experience and seniority in the business and help this art from dying.

Better assistance for small organizations and individual freelancers.

More English and internet used

Financials

We may not be able to carry on the publication due to financial difficulties

Financing

Government

We hope the ethnic media helping us to get more ads from government in order to compensate to the lack of the merchant's

I hope the government will help us by giving us some fund

Ethnic media is going to do better with Government support in the next three years.

We hope the Government officials give the right business support to Ethnic Media if wants to keep the multiculturalism in Canada.

The government should allocate some funds for the small or medium publications company like us who just cater for Chinese readers but we act as a bridge between the Chinese and Canadian businessmen who wants to do more Chinese business or who even want to open his trade business in China eventually !

The government should help to diversify and integrate business from all sources to different minority groups – one of them is Chinese. Community newspaper being a tool for marketing such message out to the mass Chinese population including Chinese traders and business entrepreneur.

More support from Governments and businesses

More funding and support for smaller publications instead of just the big well known publications.

Support from Federal, Provincial, Municipal and Corporate sector

"Ethnic Media" is a term that refers to the ethnicity of the individuals who are involved in the media within the "their communities" - the outsiders, the non-official media, media of and for second-class residents and citizens of Canada.

The so called "Ethnic Media" must be treated equally to the mainstream media in receiving financial assistance from governments.

We expect more productivity, professionalism and assistance and fair treatment from the government

The government ads, and funding to specific projects initiated by the ethnic press so as to serve their

The coming three years, the ethnic media industry would represent the world population in general in order to enhance the development of economic, social and political activities of Canada. All the contents of publications of the ethnic media would be Canadian and above 70%.

The ethnic media industry would get pension plan and fund from Canadian Government.

Based on the content and quality of the paper/magazine more transparent support from the Governments

We need government support.

Demographics

Post-war immigrant ethnic media will continue to decline, recent immigrants still have numbers

As the current generation ages and dies, there will be less need for ethnic media as the newer generations integrate more with the Canadian community.

If the present trends in immigration continue, the readership will continue to grow as it did during last couple of years. Growing number of children learning mother language of the country of origin of their parents is another factor contributing to the growth of the readership. However this will be very much dependant on the federal government's policies.

The increasing interest in community activity.

More younger immigrants get their involvement in local community activities.

More Chinese immigrants will run for public posts.

The ethnic media will play a much heavier role between main stream and ethnic community.

more participation by members and activities as per demand and needs of community

With larger numbers of visible minorities settling in the GTA, there will be increased need for more ethnic publications

The need for ethnic based media could expand as the number of immigrant population is steadily increasing in the GTA year by year. Hence, we have to improve our production quantity and of course the contents.

Due to increasing numbers of ethnic communities sector is expanding, most members prefer ethnic media services for getting news and other relevant information about their culture and home-country.

Ethnic Media is a growing industry in terms of audience and with the advancement of technology digital media is bound to grow in leaps and bounds in the YouTube generation

I expect a lower readership of the ethnic press as Canadian born in every ethnic community loose the use of their native language skills.

The world is changing to the better; dictators are crumbling and people powers are emerging; this is happening around the world where the ethnic communities have come from; ethnic media will have a unique role to bring news to their readers and to serve by being a strong bridge between these evolving democracies around the world and the Canada they respect and defend.

Growth

A LOT MORE ETHNIC MEDIAS

Media objectives and more specific to media planning

The ethnic media industry will grow stronger and stronger. It will become the new mainstream media.

A lot more ethnic media

I expect that ethnic Media will be More important in next 3-5 years

Technology

I expect there to be a larger interest and demand for media diversity.

The market is changing every year. We have to focus on the ongoing changes to build on our brand. The major changes will be in the way how we read news in the digital world with the likes of e-reader and i-pad presenting

New challenges and opportunity.

Ethnic Media must create his own data base for stack photo gallery, that way all publishers with in the ethnic press will able to buy

Technological, logistical, and financial.

Less paper work

I think with the advancement of technology most of the media will be digitalized and e-magazine will be the norm rather than exception.

Internet

Internet growth

It will be less local and more global. I see the end of printed newspapers and magazine. Readership will be over the web ....and then anyone from anywhere in the planet could become a reader. I think in terms of TV, I see fewer and fewer broadcasters willing to carry "ethnic" programming, making the current migration to the web become an evacuation. I see ethnic radio strengthening its audience ... although most of that new audience will be ears in cars. Ethnic radio is going to have to learn how to take traffic and weather breaks!

We feel internet will play a big role as to how we read news and the scope of growth in online media

We see an increasing move toward online and digital publications. In this regard we have established a presence in social media on Facebook which is linked to our website at: www.celtic-connection.com. We expect the trend to continue with increasing online traffic. Previously our demographic was primarily the older very settled immigrant population who were not technically aware. Many of these older immigrants are now deceased and the obituaries has become one of our biggest sections. The recent influx of new Irish migrants to Canada who are very active on social media and the Internet is changing the landscape very quickly but many of these are not permanent residents and only here on 2 year visas so the demographic is changing and becoming much more fluid. The ethnic media could become much less relevant to these newcomers who are far more adept at assimilating or it could be a whole new beginning if we can adjust to accommodate these new arrivals.

More community newspapers will be on line

We have started a publish the Torontohye on Armenian Community Centres web site in pdf format. In the future we would like to have our own web page and make the Newspaper to be accessible to everybody in the world.

More direct communication and recognition to the new or small media.

The greatest change has been the digital, more internet based readership which we are addressing. Other than that the role of ethnic media will remain the same to inform our communities primarily what is happening here and then secondary whatever is going on back in their former homelands

The Internet is an issue, and it would be nice to make some money from having the newspaper on the web, but I haven't seen a way to do that yet. People's willingness to pay for a subscription to the paper has declined, but we have successfully (till recently) been offsetting that loss in income with advertising and increased depots at which readers can pick up the paper for free.

Increase of on-line content - ageing of readership +50 and an influx of a new immigrant wave

Internet advertising will grow"

General

"To establish human right

A lot of changes, if we follow the way the main stream media reacted.

Growing publication.

I am not very hopeful in this scenario.

Not much

Not much

Nothing much

Not much

I would be very happy to see every one of my colleagues' publications grow to three times their present capacity.

No changes expected

No idea."

Appendix 4:

NEPMCC Survey

Reason for Change in Expected Revenue

"Why do you expect to see this change in revenue?"

The response text of 62 NEPMCC members follows;

"Economy

Advertisers seeking different turns due to the downhill in economy.

Because the economic is still slowdown.

Due to market conditions

Primarily the economic downturn and aging demographic.

Delayed effect of the recession. An overall weak economy. Government policies regarding taxes and grant programs.

Prospect of growing economy, better usage of the net

Revenue / Advertisements

Because of the decrease in revenue

Increasing competition for advertising revenue from the big players like Rogers and Toronto Star and steady decline in Government Advertising Revenue

Still a very recessionary, advertising depressed market.

Revenue from government advertisement

Improved advertising revenue

Adding to number of pages and getting more advertisements.

Less ads.

Growth in advertisers

MORE ADS

Ad decrease

Advertisers

No major corporate advertisements.

Funding …. Because if I get the support from Canada Periodical Fund to help the magazine with printer costs, delivery probably I would hire an employee to the sales department to help me to grow the sales.

We are in a steady decline in terms of revenue unless there is some injection of funds from external sources

Because we don't have funding or strong support of finances to expect anything better.

We hope to obtain assistance and purchase new equipment.

This might change the format and attract more sponsors.

Circulation

Assuming the growth of the circulation during the last 12 months will continue in next 12 months as well, there will be more advertisers.

More readers, more advertisers, more subscribers.

Competition

There are more competitors in the market and the economic is still not recovered yet.

more competition and aggressive expansion of the mainstream media in the ethnic market

Competition

Expansion

We have added new station Fort McMurray as a new market.

It is undergoing change to new management and the new company know much more about the market and they have the experience to increase more sales even though competition is very strong in the market.

I am hoping my photography work will be recognize by media editors and the demand for stock photo will increase

We created another new magazine.

We have been making improvement on our content and found some new people interested on collaborating with the tasks.

We improved our Magazine

Work Ethic

Consistency and hard work

I am getting older and my energy levels are lower.

We are working hard and trying to adapt changes

We would expect seeing for more production and meaningful work.

Marketing

We are trying to market it differently targeting select corporate houses for advertising revenues

Advertising campaign and distribution

More work devoted to sales and marketing

We are going to new campaign.

MORE MAIN STREAM BUSINESS TARGETING SOUTH ASIANS

More office, fuel expenses, less advertising

Restructuration

With rising cost and recession with increased competition.

Our company is pretty old, moving forward at a reasonable pace and is growing.

We are not seeing any signs of growth

Normal growth"

General

"No change N/A

N/A

N/A

Nothing

n/a

No change.

I don't know"

Appendix 5:

NEPMCC Survey

Reason for Change in Staff Size

“Why do you expect to this change in the number of full-time staff?”

The response text of 56 NEPMCC members follows;

“Volunteers

Hoping for more volunteers

Revenue / Sales

Revenue generated does not meet the expenses, so hire free lances and outsource printing.

If the sales go down further, we may have to reduce some staff.

Sales revenue will go up

If revenue streams improve more freelancers will be hired

Growth in revenue

It is hard to keep staff with the desired salaries as we are in a negative cash flow for our publication.

More Revenue by ads required to change this

Sales Dept

Media job openings and revenue

MORE ADS

Funding

We hope that we will hire more people if we get fund

I am expecting to have a partner to join our company otherwise we are going to close the operation.

More tightened conditions to operate.

WE EXPECT AT LEAST THREE FULL-TIME STAFF İF WE HAVE ENOUGH RESOURCES

Staffing requirements

More work for others.

I will lose 1/2 staff

Someone with Hi Tech qualifications.

Maybe one or two marketing personnel

Growth

We expect to grow and hire more staff.

Measured expansion.

I need to start a sales team department and have somebody to do the office work.

The change could help us to enhance the production and distribution.

We do not see any immediate growth

Publish more magazines and enlarge the area.

By having other people working as full time or part time we will increase our content quality also will be able to sell more ads to subsidize our media.

Expand the company

General

We might hire a full time designer in coming year.

Our publication distribute on weekly basis and Thursday is the printing time so our job usually work on Monday,

Tuesday and Wednesday and cutting off time is Wednesday 5:00 pm so all staff are on part-time basis.

We hope we will be able to afford a full time staff

No particular reason

We would expect to hire the skills of a regular personal assistant staff member.

Work and work.

Experience & Training

Difficult to attract full time staff due to the pay package, once they get experience, they would like to move in to a better job/career

Professional Training is required."

General

"No change N/A

No

None

Same

N/A

N/A

N/A

None

No Change

None

No change.

N/A

n/a"

Appendix 6:

NEPMCC Survey

Suggestions to Encourage Young People to Read

“From your perspective, how can young adults be enticed to read?”

The response text of 90 NEPMCC members follows;

“English / language

By printing in English language

To publish contents in both languages, our mother tongue and English.

To publish subjects that they might like with lots of community photos.

More entertainment, more English

Showcase all materials in English.

You have to talk their language, provide content that they find interesting and promotions directly aimed at them. That is how you will increase young readership.

Young readers read the paper if we publish in English and topics related their problems.

Besides the main language the publication caries a portion of 30 to 35 % In English, just to keep up with the demand of the younger generations.

We are publishing lots of English articles.

Creating a language tone that captivates the Challenge.

Relevant content

More youth content and the use of new technologies.

If we published the material of their interest

By providing them with relevant news.

To bring young adults to related subjects.

Organize and report more young adult activities.

Increase contents and article about tissues those matter to young people. Also by covering their activities and events in the publication on regular basis.

Deliver well written, topical, important information that they can only get by reading a specific publication and/or website.

By providing interesting and enlightening materials.

More tailored content (in terms of subject matter, writing style, layout, etc)

Articles about them or their peers

If we publish some item interesting to young adults we can attract them to our newspaper, and they will naturally read more.

By putting more stuff for young adults that interest them the most.

Provide contents for their taste such as entertainment, sports and education.

We change the style and presentation to meet segment's desire

Pay attention on topics what they are interested

Encourage young writers to be part of our team

Included article about new technology/issue/fashion/cinema/socio-economic findings/trend in social media

Connecting readers to what is happening locally and back from their country of origins has always helped us

Attracting readers to read our publication

Staying connected with them and addressing their concerns in our publications.

As a photographer, the daily activity of young people that matter to them has to be addressed. otherwise it is going to boring for them to follow the publication.

By covering items and stories of their interest.

Include materials for the youth give them what the main stream media is giving, the 2nd generation young adults do care for what is happening back home, nor do they read in mother tongue.

They are not our market but we need them in order to keep re filling readers that pass on.

Provide information that young people are attracted in a format acceptable to them. Give space in the magazine and let them be in charge of that particular page.

Provide the contents they are interested.

By focusing on events and programmes that directly impact on them i.e. youth development, recreation and educational matters

Publishing the content they are looking for daily, We are unique on daily local Latin / Caribbean news & entertainment.

Publish interesting news for youth (eg. sports, entertainment)

By providing content that is attractive to young adults and relates to their social issues

By publishing stories and photos interesting to them.

By providing content of their interest which is exclusive.

Offer materials suitable for them.

Include articles of interest to them in the paper.

By giving reasonable useful information re: employment, education, children stuff like

When it is interesting.

Publishing the contents they are interested on.

Creating their interest and Hi tech items

Through quality timely short articles, news and views

Provide content geared for young readers

By providing content that address their needs-be it their need for employment, academic information, knowledge of their rights, entertainment and lifestyle.

Quality content

Strong articles and unbiased reporting

Good content, connecting the community and helping community businesses grow. Organizing various community events keeps the community together

By providing quality content

Our audience consists of all ages. The programmes are beneficial for the family as a whole. However, we strive to capture /attract the younger audience mostly with sports, entertainment, and documentary, the latter enhances knowledge..

The newspaper can't be closed until it has been read. The newspaper is easy to read. Leave jargon and hard-to-read words inside the newspaper. It is not a medium for impressing readers with an enhanced vocabulary.

Fun content

By making it positive and fun, but also providing serious information without discretion and censorship because everyone likes to know what is going on in their world.

Enjoyable articles to read and news according to their interests. Educational.

Delivering it in their hands and loading it with goodies.

Engagement

By being given opportunities to get involved in the materials they are given to read. These days the younger generations need their opinions and ideas shared more than ever after the popularity of blogging and sharing your thoughts on line.

By making the publication more interactive, we regularly encourage feedback and comments from the readers and readers can also publish article if it merits for publishing

To be engage in self-actualizing level of mentality away from "living to work" and moving towards "working to live"!

Internet /social media

Internet

Create a web site for our publication in which we could put in elements which would attract young adults such as ESL for young immigrants (as they all have difficulty in learning English) and what are the current new web games in the market, trendy fashion from HK or Paris, they could find interesting stuffs from our weekly on-line newspaper so we could maintain this young population to read our newspaper so as our advertisers would like to put more ads into our publication.

Social media updates with cross reference to websites is important / also reaching out with issues and items directly related to their lifestyles.

Post news and articles to the internet, use the social media, publish local contents, life style and entertaining

Providing them what they want to read, eg entertainment news, social news, non-serious news etc.

Entertainment and Sports

Life style, entertainment and career guidance

By providing content through new technology and availing through info sources.

By giving them more media choices, regularly giving them news alerts and so on.

More visual and sound effects in the editions

Family / cultural influence

Starts at home with the reading of books

In school with proper streaming

Developing interest in writing

People who are connected with their culture read our publication cover to cover.

Yathra paper is distributed through community centers and at community events

General

That's a $1,000,000 question

Waning interest from Third Generation Canadians not relevant

We take pride in providing our readers with a high quality of written material delivered with respect and professionalism. The editorial line places emphasis on articles of an unbiased nature and offers a wide variety of content, covering items of interest and current news from around the world.

It varies from adult to adult

I hope that, the young adults will be more interest in reading"

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