

# MIRROR ON THE INDUSTRY PT 2:

*HAVE TV ADS IMPROVED IN THE LAST 2 YEARS?*

# Key points from MOTI PT 1.

1

Representation levels for minority groups in TV advertising were too low, especially when it came to lead roles

2

Minority groups didn't feel like ads were inclusive – tokenism was rife and stereotypes were over-used and often damaging

3

It was seen as our responsibility as an industry to improve and embrace diversity and inclusion – with significant commercial, creative and societal benefits to doing so

# This wave explores 3 key question areas

1

**HOW WELL DOES TV ADVERTISING REPRESENT MINORITY GROUPS?**

*How has this changed since 2 years ago?*

2

**HOW MUCH OF AN EFFECT DID THE EVENTS OF 2020 HAVE ON THE DIVERSITY OF ADS?**

*What perceptions do minority groups and the total population have on this?*

3

**HOW CAN WE MAKE OUR ADS MORE INCLUSIVE?**

*What tangible steps can we take to go beyond face value representation and drive true inclusion?*

# METHODOLOGY:

1

## FULL TV ADVERTISING AUDIT

Coded the **top 1000** TV ads from March and September **last year**

- Which **minority groups** appeared
  - What **roles** they played
- How they were being **portrayed**
- What **type of ad** they appeared in
- How **long** they were **on screen** for



2

## ROBUST QUANTITATIVE SURVEY

Surveyed a **nationally representative** sample of **2000 adults aged 16+** to gauge current perceptions of **diversity in advertising**

Boosted samples for **minority groups**



3

## INDEPTH ONLINE FOCUS GROUPS

**6 x** online **focus groups**, each with 6 people, using **maximum diversity sampling**

Explored **authenticity, tokenism** and **stereotyping** in ads, and what they feel **brands** can do to be **more inclusive**



# The past year has seen some major movements bringing issues of diversity & inclusion further into the limelight

**23<sup>rd</sup> March 2020**

PM announces the first COVID-19 lockdown in the UK

**25<sup>th</sup> May 2020**

The murder of George Floyd sparks worldwide BLM protests

**7<sup>th</sup> June 2020**

The Edward Colston statue in Bristol is toppled by BLM activists

**5<sup>th</sup> September 2020**

Diversity's BLM dance performance on Britain's Got Talent receives 24,500 Ofcom complaints

**14<sup>th</sup> November 2020**

Backlash against the Sainsbury's Christmas advert

**11<sup>th</sup> May 2021**

Queen's speech confirms LGBTQ+ conversion therapy is to be banned in England and Wales

**24<sup>th</sup> August 2021**

Paralympic Games to be held in Tokyo

**10<sup>th</sup> September 2021**

Channel 4 launches 'Black to Front' project

60%

say they've become **more aware of the challenges** faced by different groups in society

"People from different backgrounds and within all the groups discussed are the backbone of this country. Any ad campaign made today can be made using people from these groups without changing anything, other than the actors"

1/2

have started **paying more attention** to the way different groups in society are reflected in ads

This means that **issues and challenges around D&I have become even more top of mind for the public**

Source: Tapestry/c4 Quant Survey  
May 2021 Sample: 2000 resps



**DISABLED  
PEOPLE**

**ETHNIC  
MINORITIES**  
*RATHER THAN BAME*

**LGBTQI+**  
*RATHER THAN LGBT+*

Things are  
constantly  
evolving; including  
the terminology  
we're choosing to  
use

Source: Versiti

HAVE  
THINGS  
**IMPROVED**  
SINCE OUR  
LAST AUDIT?



# The representation of LGBTQI+ people and disabled people has not improved in the last two years

3%

of TV ads feature people from the **LGBTQI+ community**

**vs 3% in 2019**

(**6%** in the UK population)

3%

of TV ads feature **disabled people** (physical or invisible)

**vs 2% in 2019**

(**20%** in the UK population)

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# Representation of different ethnicities has remained flat, despite a perceived increase following the BLM movement and racism education

**37%**

of TV ads feature  
**black people**

**vs 37% in 2019**

**(3%** in the UK population)

**15%**

of TV ads feature  
**South Asian people**

**vs 12% in 2019**

**(7%** in the UK population)

**8%**

of TV ads feature  
**East Asian people**

**vs 8% in 2019**

**(1%** in the UK population)

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# Despite the D&I focus in the ad industry, the proportion of lead roles played by minority groups has not moved in 2 years

1%

Show disabled people in a lead role

Show people from the LGBTQI+ community in a lead role

Show east Asian people in a lead role

Show people from other ethnic minority groups in a lead role

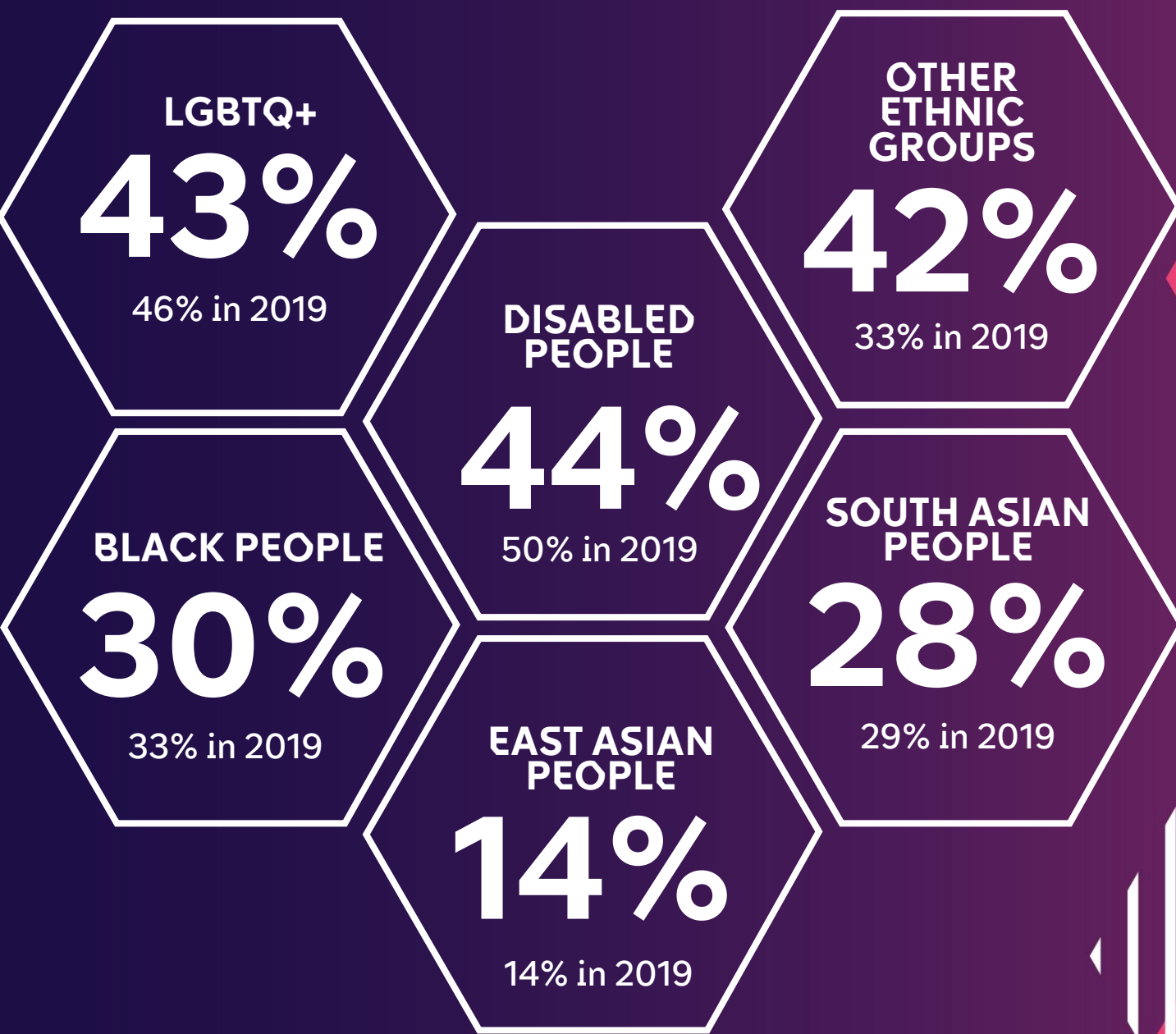
11%

SHOW BLACK PEOPLE IN A LEAD ROLE  
12% in 2019

4%

SHOW SOUTH ASIAN PEOPLE IN A LEAD ROLE  
3% in 2019

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020



# Tokenism on the rise?

The levels of lead roles for minority groups in the ads they featured in have generally decreased since 2019



Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# We wanted to expand the groups we looked at in this wave...

73%

of TV ads feature **women**

*vs 81% men*

7%

of TV ads feature **someone of lower social grade**

*vs 77% assumed ABC1*

29%

of TV ads feature **50+ characters**

*vs 76% assumed 18-49s*

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

WOMEN  
**39%**  
OVERALL

**53%**  
ADS  
THEY'RE  
IN

LOWER SOCIAL GRADE

**2%**  
OVERALL

**33%**  
ADS  
THEY'RE  
IN

OVER 50S

**12%**  
OVERALL

**41%**  
ADS  
THEY'RE  
IN

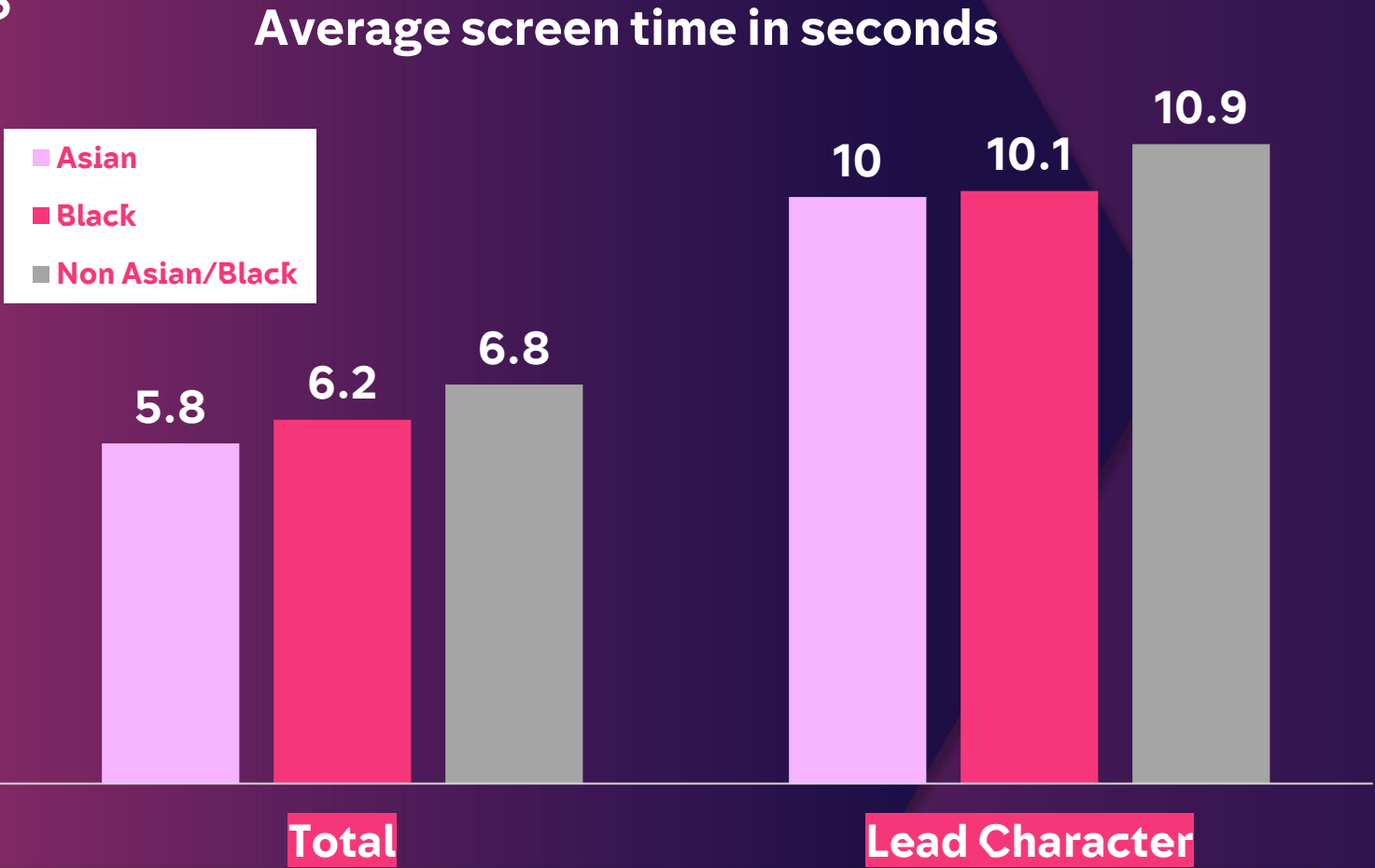
Lower social grade  
& over 50s have  
a similar story to  
the other groups  
when it comes to  
lead roles

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020



# Screen time is a revealing metric for tokenism when it comes to ethnic minorities...

Black & Asian characters have less average screen time in ads



Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# Minority groups are more likely to be featured in certain types of ads...

**DISABLED  
PEOPLE**

**10x**

**MORE LIKELY TO  
BE IN  
DIRECT  
RESPONSE  
ADS**

Over 4x more likely than the  
next minority group

**LGBTQI+**

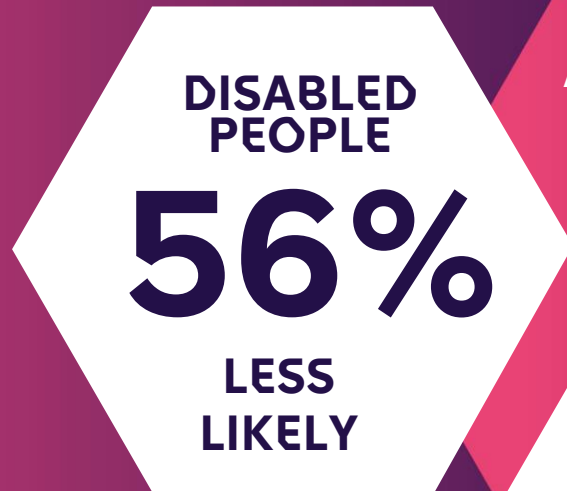
Over

**2x**

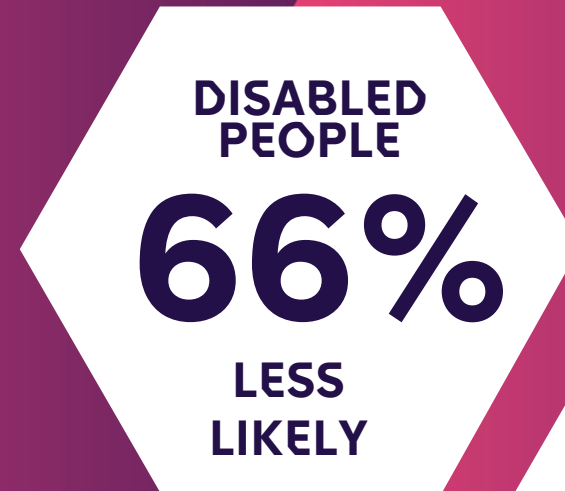
**MORE LIKELY TO  
BE IN  
BRAND  
BUILDING  
ADS**

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# ...and less likely to be featured in 'business as usual' comms



ADVERTISING  
A PRODUCT  
OR SERVICE



LAUNCHING  
A NEW  
PRODUCT



Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# Looking at intersectionality revealed biases and stereotypes

**BLACK CHARACTERS ARE MORE LIKELY TO BE YOUNGER**

(TEENAGE ESPECIALLY) WHILE 50+ CHARACTERS ARE TWICE AS LIKELY TO BE WHITE

**SOUTH ASIAN CHARACTERS ARE MORE LIKELY TO BE SHOWN AS LOWER SOCIAL GRADE**

'I THINK SOUTH ASIANS TEND TO BE UNDERREPRESENTED ON TV OR MISREPRESENTED IN STEREOTYPICAL WAYS'  
FEMALE, MIXED ETHNICITY, 16-34

**MIXED ETHNICITY CHARACTERS ARE TWICE AS LIKELY TO BE FEMALE**

ALSO OVER 2X MORE LIKELY TO BE YOUNGER CHILDREN (AGE 4-12)

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# Looking at intersectionality revealed biases and stereotypes

**LGBTQI+ CHARACTERS IN ADS ARE MORE LIKELY TO BE WHITE**

ALSO NEARLY TWICE AS LIKELY TO BE REPRESENTED AS YOUNGER ADULTS (UNDER 30)

**DISABLED PEOPLE IN ADS ARE MORE LIKELY TO BE OLDER**

SIGNIFICANTLY LESS LIKELY TO BE SHOWN IN THE WORKPLACE OR SOCIAL SETTINGS – I.E NORMAL SITUATIONS FOR EVERYDAY LIVING

**OLDER CHARACTERS IN ADS ARE MORE LIKELY TO BE MALE**

“WE NEED MORE ADVERTS WITH MORE POSITIVE REPRESENTATIONS OF MIDDLE AGED WOMEN”  
FEMALE, WHITE, 50-54

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

**HOW DID THE  
EVENTS OF 2020  
REFOCUS THE LENS  
ON DIFFERENT  
MINORITY GROUPS  
IN SOCIETY?**



# As the pandemic unravelled issues for minority groups began to emerge

**OLDER AND  
DISABLED PEOPLE AT  
HIGHER RISK AND  
PUSHED TO THE  
OUTSKIRTS  
OF SOCIETY**

**LGBTQI+ PEOPLE  
DISCONNECTED  
FROM THEIR  
COMMUNITY AND  
SUPPORT  
NETWORK**

**A RISE IN ANTI-  
ASIAN RACISM AND  
HATE CRIMES  
ACROSS THE  
WORLD**

Sources: Age UK, 'The impact of Covid-19 to date on older people mental and physical health', August 2020, ONS 'Coronavirus and the social impact on disabled people in Great Britain: February 2021', LGBT Foundation, 'Hidden Figures: The impact of the covid-19 pandemic on LGBT communities in the UK', May 2020, House of Commons Library, 'Hate Crime Statistics', December 2020.

# The Black Lives Matter movement shone a light on issues of representation for ethnic minorities

51%

say that movements like BLM have made them realise that there's **a problem with the representation** of minority groups in advertising

**"Discussions must be had** (regardless of how uncomfortable they seem) with friends, family...even those who we regard as having high ethical and moral values and beliefs. We must **look ourselves in the mirror** and ask ourselves if we have participated (even unknowingly) in covert racism, and how we can **better inform and prepare ourselves** for future generations." – Female, 23

68%

say that TV advertisers need to do more to **include people from ethnic minority groups** in TV adverts

Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps, 4Youth, 2020

HOW MUCH OF  
AN EFFECT DO  
PEOPLE **THINK** THE  
EVENTS OF 2020  
HAD ON  
THE DIVERSITY  
OF ADS?

# Widespread discourse around 2020's prolific events left people feeling optimistic

51%

noticed a positive change in the representation of minority groups in TV advertising since Black Lives Matter

39%

felt the covid-19 pandemic has had a positive impact on minority characters in ads

"More diversity in fashion and supermarket, adverts for mental disability, also **mental health awareness during covid** makes these less of a stigma; **black people** are now routinely featured in all types of advert due to pressure from **Black Lives Matter**"

Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps

57%

Agreed representation of  
**BLACK PEOPLE**  
has improved

"I think more adverts have been focused on **black people** since the black lives matter movement happened"  
Male 25-34, White

35%

Agreed representation of  
**EAST ASIAN PEOPLE**  
has improved

41%

Agreed representation of  
**SOUTH ASIAN PEOPLE**  
has improved

People felt representation of ethnic minorities has improved, particularly for black people

Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps

# Well over a third of people felt LGBTQI+, disabled and older people are now better represented too

**49%**

Agreed representation of  
**LESBIAN/GAY/  
BISEXUAL  
PEOPLE**  
has improved

**38%**

Agreed representation of  
**TRANSGENDER  
/NON BINARY  
PEOPLE**  
has improved

**48%**

Agreed representation of  
people with a  
**PHYSICAL  
DISABILITY**  
has improved

**43%**

Agreed representation of  
people with a  
**MENTAL  
DISABILITY**  
has improved

**39%**

Agreed representation of  
people with a  
**OLDER PEOPLE**  
has improved

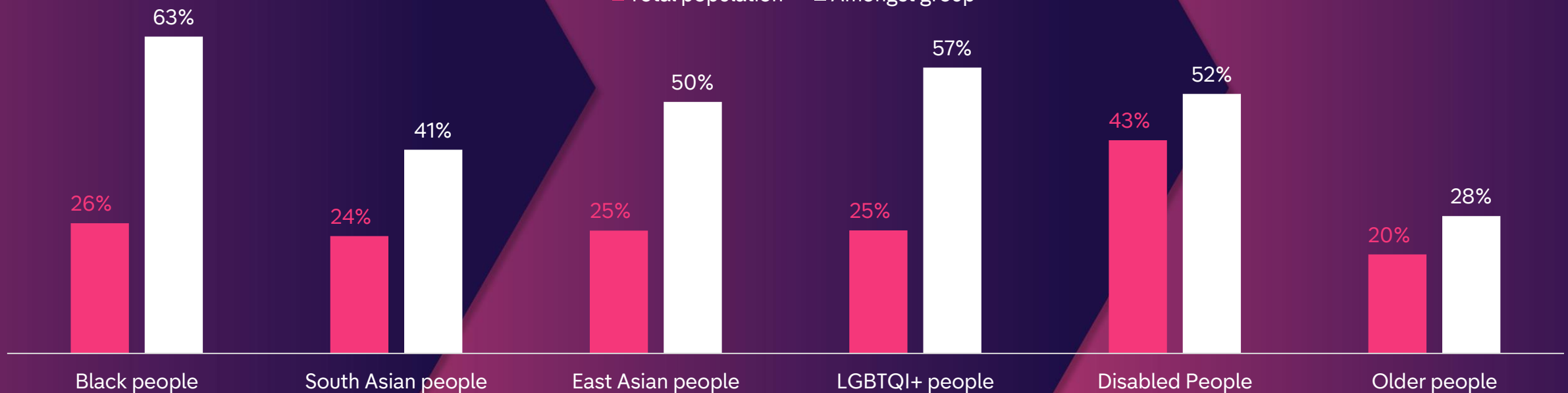
Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps



# Yet, minority groups are still significantly more likely to think more needs to be done

% think each group should be more represented in TV advertising

■ Total population ■ Amongst group



Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps

HOW MUCH OF  
AN EFFECT DID THE  
EVENTS OF 2020  
**ACTUALLY** HAVE ON  
THE DIVERSITY OF  
ADS?

# Despite impressions that diversity in advertising had improved following the BLM movement, results remained flat

**38%**

of TV ads feature  
**black people post  
BLM**

**vs 36% pre BLM**

**16%**

of TV ads feature  
**South Asian people post  
BLM**

**vs 15% pre BLM**

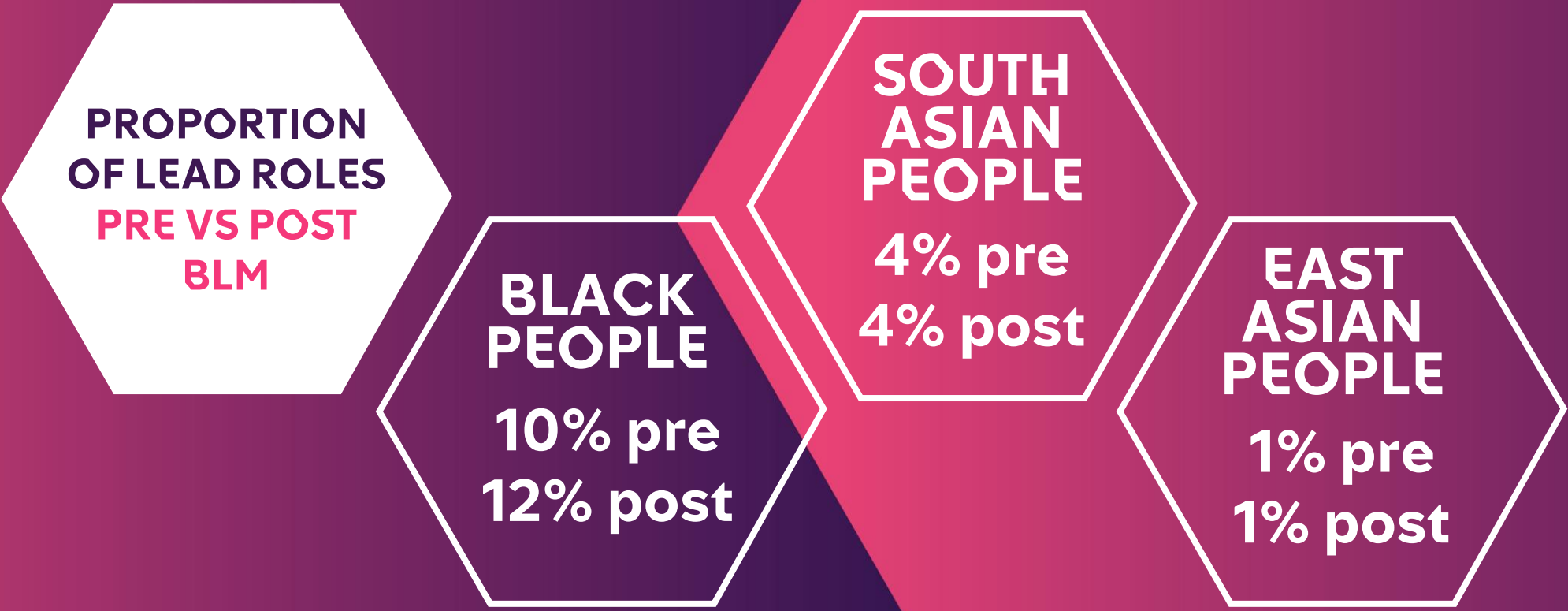
**8%**

of TV ads feature  
**East Asian people post  
BLM**

**vs 7% pre BLM**

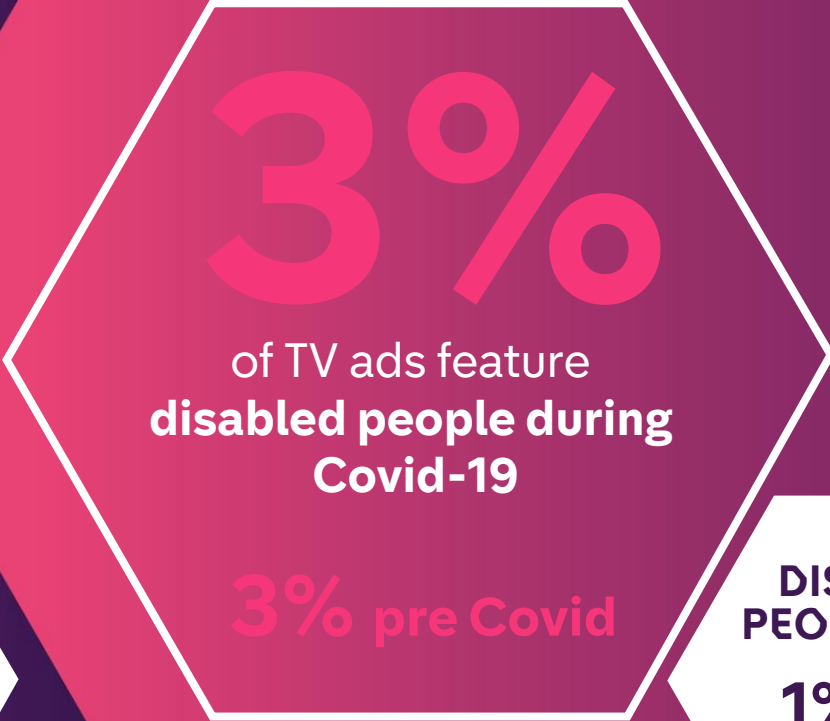
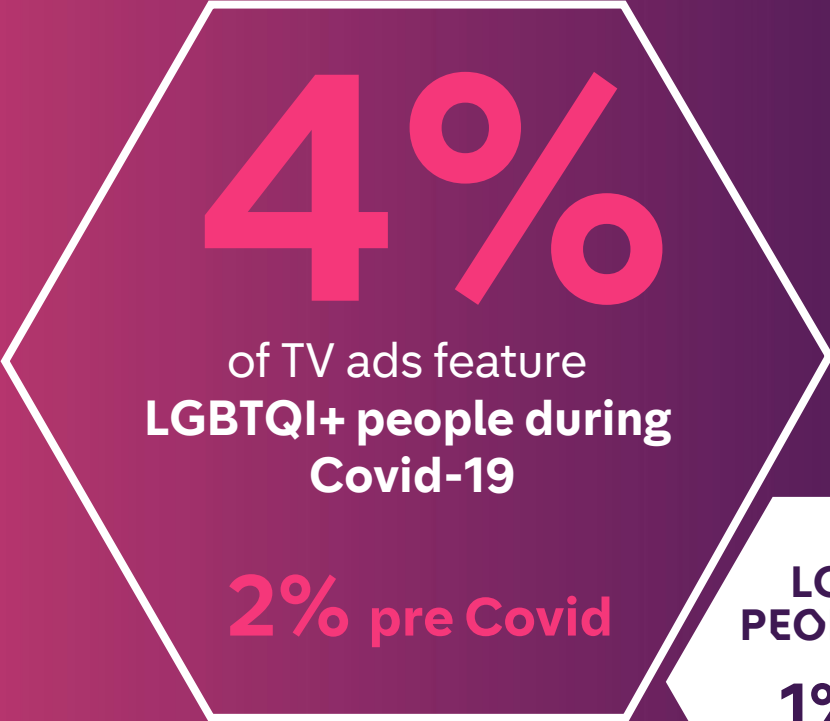
Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# This pattern remains consistent even when we look lead roles pre and post Black Lives Matter



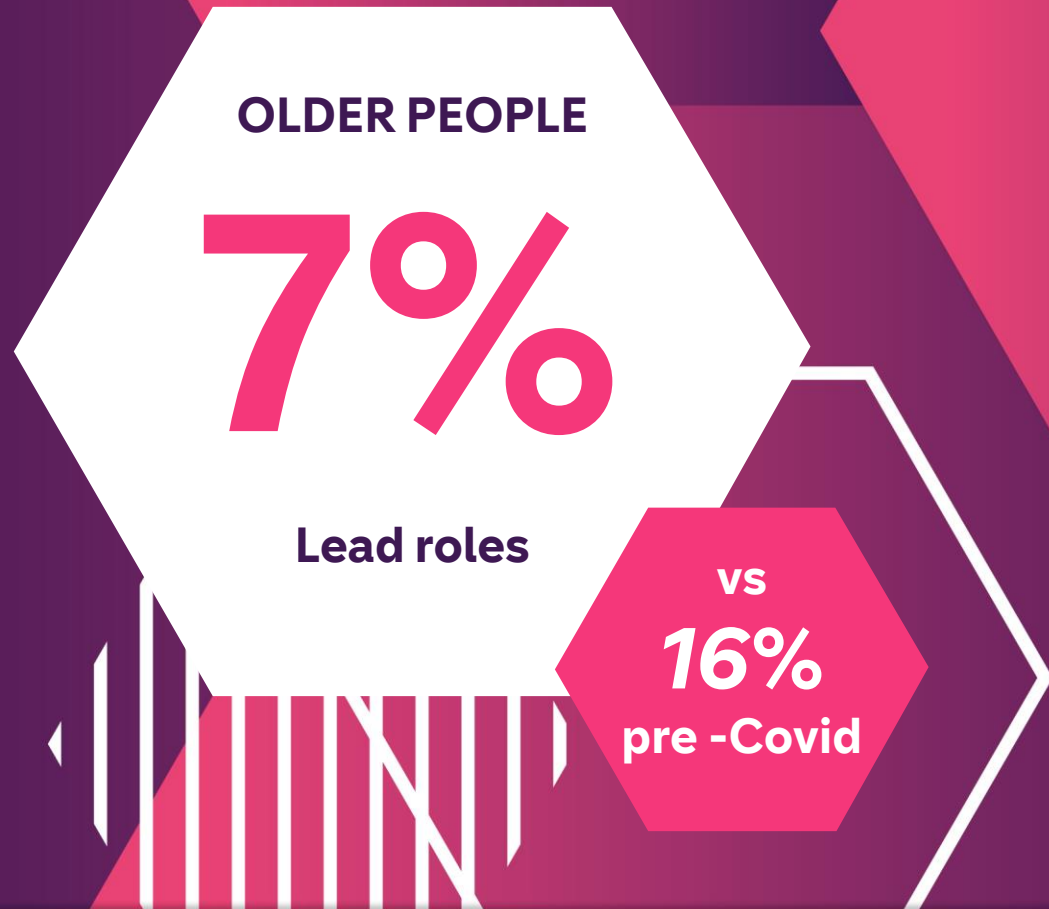
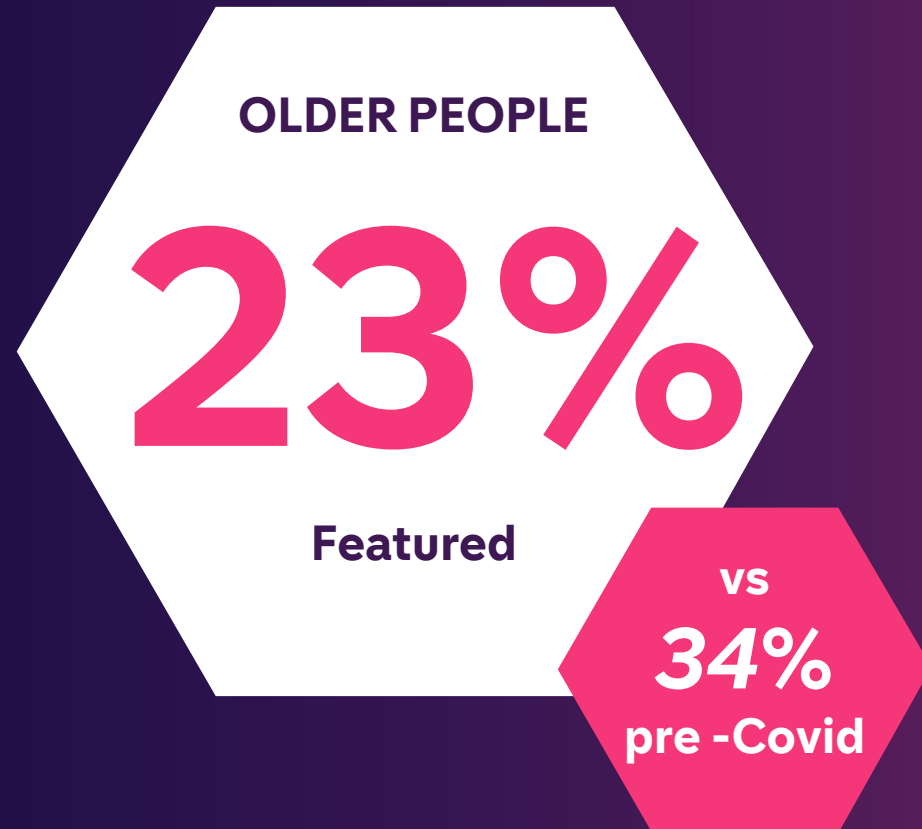
Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# Despite raised awareness of LGBTQI+ and disabled people's challenges during the pandemic, there was no shift on screen



Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# In fact, representation of older people regressed during the pandemic



Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020



HOW DID THE  
EVENTS OF 2020  
IMPACT THE  
**FORMAT** OF  
DIVERSITY IN  
ADVERTISING?



Source: C4, Spectrum of Marketing with Meaning, 2021

# Advertising during the covid-19 pandemic has had a more positive tone

**26%**

of ads during Covid-19 used an **emotive tone**

vs. **19%**  
pre-Covid-19

**12%**

of ads during Covid-19 used diversity to **facilitate togetherness**

vs. **7%**  
pre-Covid-19

**7%**

of ads during Covid-19 used diversity to **spread joy**

vs. **2%**  
pre-Covid-19

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

**Pre-Covid**  
(Jan-Mar)

**25%**

ads were  
**montages**

**During Covid**  
(Apr-Sept)

**36%**

ads were  
**montages**

**Pre-BLM**  
(Jan-May)

**25%**

ads were  
**montages**

**Post BLM**  
(Jun-Sept)

**37%**

ads were  
**montages**

**With the limitations of Covid-19 and in an effort to showcase diversity in ads we saw a significant increase in montage style ads with multiple characters**

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

**51%**

**black people vs  
35% non-black**

**36%**

**white people vs  
48% non-white**

**63%**

**disabled people  
vs 34% non-  
disabled  
people**

**49%**

**older people vs  
36% 19-49s**

**58%**

**Asian people vs  
34% non-Asian**

**43%**

**LGBTQI+ people  
vs 31%  
non-LGBTQI+**

**With a much  
higher  
proportion of  
minority groups  
being more likely  
to feature in  
montage ads, it  
can feel like a  
tick-box  
exercise**

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# 1/2

of ads coded as  
tokenistic  
were montages

“include all of the groups of people talked about in this survey, but **in such a way that it doesn't simply feel like a tick box exercise** - genuine advertising is needed”

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# IS THERE A PLACE FOR MONTAGES?



# Montages can work if they don't feel artificial

Case Study: NHS Track and Trace



80%

Of viewers felt this advert represented modern British Society well

52%

Of older viewers thought this advert was relevant (44% for all viewers)

Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps

**This ad was successful amongst viewers because it drew on intersectional diversity, relatable characters and authentic shared emotion**

"I liked the **diversity**. I loved that people were talking about the most important thing in life...there **loved ones**. I liked the **different ages**, and also **different lifestyles** represented."

**1/3** could relate to some or all of the characters

**57%**

Said the advert made them feel **more positive about the brand**

"It was very **emotive** and showed a vast **spectrum of British culture**, particularly in a place like London. Really well thought out. It **tugged at the heart strings**."

"**heartwarming** we are all the same and want same things"

Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps

**OLDER  
PEOPLE**

**85%**

More likely to appear in  
Gov. social political  
organisation ads

**SOUTH ASIAN  
PEOPLE**

**2x**

More likely to appear in  
Gov. social political  
organisation ads

**DISABLED  
PEOPLE**

**14x**

More likely to appear in  
Gov. social political  
organisation ads

**...but this case  
study still draws  
focus to the fact  
that the  
advertising  
industry needs to  
break the pattern  
of boxing groups  
into ads for  
particular sectors**

Source: Tapestry/c4 Coding - Top 1000 adverts shown on TV in March & September 2020

# HOW MUCH DOES DIVERSITY MATTER IN ADS?

# People feel we're yet to see experiences of minority groups coming through in ads – and think complaints are holding back progress

"Britain's beauty is predicated on the diversity of the people who live in and call Great Britain their home. We, the people, cherish our cultural identity. **Television advertisements do not yet reflect the experiences and aspirations of multicultural modern Britain.**"

"I don't feel the modern Britain is well portrayed on TV ads because **there are a lot of groups of people and communities that are not represented enough.** I wonder if the **brands and organisations and companies behind the adverts are scared of complaints being sent into Ofcom.** I'd really like to see some change especially after the hell we've all been through over the past two years"

# 1/2

agree that ads could be more diverse if some people didn't complain about them

Source: Tapestry/c4 Quant Survey May 2021 Sample: 2000 resps, Versiti Focus Groups June 2021



# BUT... IS ANY REPRESENTATION BETTER THAN NO REPRESENTATION?



“The impact can be really damaging and take us backwards / regress if an ad gets it really wrong”

Source: Versiti Focus Groups June 2021

# DOING NOTHING ISN'T THE NEUTRAL OPTION

People are still  
calling for  
representation  
of all society

"Having  
**all white people**  
is not doing 'nothing'.  
It's doing  
something wrong."

"We are part of  
this society.  
We should be reflected.  
**Not being in ads is being  
actively excluded.**  
Why should we settle for  
this?"

Source: Versiti Focus Groups June 2021



“Look in more depth  
at the makeup of our  
society - show more  
compassion, empathy  
and unity.  
**Represent the  
unrepresented.”**



Source: Versiti Focus Groups June 2021

**WHAT CAN BRANDS  
DO TO BE MORE  
REPRESENTATIVE &  
INCLUSIVE?**

# REPRESENTATION



# PORTRAYAL



# Channel 4's SIX TIPS FOR INCLUSIVE ADS

# REPRESENTATION

- 1** **Recognise diversity is always relevant;** normalise and maintain it
- 2** **Diversify the representation of diversity** rather than using subgroups as stand ins
- 3** **Avoid artificial montages;** explore fewer characters, in depth

# PORTRAYAL

- 4** **Build authentic and relatable characters** and create inclusive stories with them
- 5** **Diversify lead roles** rather than overplaying the point of difference
- 6** **Promote empathy** by challenging tropes and stereotypes and appreciating culture

# 1 NORMALISE & MAINTAIN DIVERSITY

**Recognise diversity is always relevant**

Maintain a commitment to diversity in all comms – not just for a single product, brand, campaign or season.

*“Don’t feel like inclusion is seasonal”*

*“I think single adverts are probably too short to have a good representation of different groups. I think long-term advertising campaigns with multiple different adverts are needed to demonstrate a brands commitment to diverse advertising”*

## 2 DIVERSIFY THE REPRESENTATION OF DIVERSITY

### Sub-groups are too easily used as shortcuts to diversity

Represent diversity in a more credible way by mixing up the casting and intersectionalities rather than automatically reverting to the same easy shortcuts

*"Have a good mix of people from all spectrums: colour, race, gender, religion, ability etc as a norm. Not quotas - THE NORM"*

*"Have a variety of people in there. Observe the community and see what type of people make this up"*

*"Have a more varied cast rather than one token person from a particular group"*



### 3 AVOID ARTIFICIAL MONTAGES

**A single ad should not aim to tick every box**

Explore fewer characters in depth and show sustained commitment to inclusion via things like ad series that allow various elements of diversity to be explored.



*"Be more diverse across a campaign rather than in each advert - it starts to look forced if they use every different culture or difference in a single ad"*

4

## BUILD RELATABLE CHARACTERS WITH INCLUSIVE STORIES

Diversity is not skin deep, characters and stories need depth to be truly inclusive

Think beyond just casting to create authentic characters that belong and give an insight into someone else's life, and stories that speak to shared experiences and emotions.

*"When we put diversity in our content only at the casting stage, yes – **diversity is being included, but authenticity is being excluded...** none of the cultural nuances or lived experiences of people from those groups has been incorporated into the set, wardrobe, actions or tone of the character. ... **It may look like you, but it's not you"***

Rich Miles, Diversity Standards Collective

# RELATABLE CHARACTERS

CONSIDER...

BACKSTORY

ASPIRATIONS

DAY TO DAY LIFE

MULTI DIMENSIONAL  
PERSONALITY

*"Look at the people in adverts as if they're actual people, **not just characters** who are meant to encapsulate an entire group of people"*

# INCLUSIVE STORIES

SPEAK TO SHARED...

HUMAN EMOTIONS

EXPERIENCES

BEHAVIOURS

VALUES

*"Focus on what we have in common, despite and with our differences"*

## 5 DIVERSIFY LEAD ROLES

**More lead roles would play a major part in normalising diversity in a fluid way**

Ads that show diverse people in lead roles without being forced are remembered and loved.

*"A positive portrayal is when minority groups are allowed to be seen in as authentic and true a way as possible.*

***Not having to be the sidekick, or best friend, but a character in their own right."***

# 6 PROMOTE EMPATHY

**Diverse audiences want to feel both understood and empowered to understand and empathise with others.**

Avoid stereotypes and tropes and promote 'everyman' portrayal

*"I liked it because it gives another person's perspective and creates empathy. She has a routine we can relate to: get up, find out about weather, make coffee, go to work, etc"*



# REPRESENTATION

- 1** **Recognise diversity is always relevant;** normalise and maintain it
- 2** **Diversify the representation of diversity** rather than using subgroups as stand ins
- 3** **Avoid artificial montages;** explore fewer characters, in depth

# PORTRAYAL

- 4** **Build authentic and relatable characters** and create inclusive stories with them
- 5** **Diversify lead roles** rather than overplaying the point of difference
- 6** **Promote empathy** by challenging tropes and stereotypes and appreciating culture

# Channel 4 occupies a niche position in relation to D&I...

Seen as a progressive, edgy, disruptive channel that embraces diversity, inclusion and equity.

Seen to be attracting more progressive brands and to have ads that already speak better to diverse modern audiences.

This is a significant opportunity in the current climate.



# In summary...

1

Representation levels for minority groups in TV advertising haven't significantly improved in the past two years, and the lack of lead roles point to tokenistic casting

2

The events of 2020 did not have the expected positive effect on the diversity of ads; montage style ads became over relied on

3

Representation and portrayal both need to be considered when making an inclusive ad; as shown through Channel 4's six key tips

# Thanks for listening

## Any questions?

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