

MRS Awards 2022
Inclusive Research
Finalist

Channel 4
Tapestry Research
Versiti

Mirror On The Industry

Summary

Channel 4 has always championed Diversity & Inclusion, which is why they are one of the loudest voices in the increasing conversation around representation in advertising.

To hold a mirror back to the industry and to effect change, they've been conducting an important, multi-faceted study for the last 3 years, Mirror On The Industry (MOTI). This is a large-scale investigation into just how representative current TV advertising is. The study combines an audit of a large number of ads to see how representative they are, alongside a survey among people from minority groups and in-dept focus groups, to get their point of view on representation in advertising and how it can be improved.

The results have been truly fascinating and have been widely shared within the industry, influencing initiatives such as Channel 4's Black To Front ad-break takeover and the Diversity In Advertising Award. The results from the 3rd and most recent wave of the study are already leading to real change, and will continue to as Channel 4 have now committed to repeating the study annually to serve as an industry tracker on representation of minority groups in TV advertising.

Synopsis

Background

Channel 4 is proud to be one of the UK's most recognised and authoritative voices on diversity and inclusion. A key ambition is to stand up for diversity and champion unheard voices in everything they do.

In 2019, to challenge the ad industry and effect change, Channel 4 launched a major insight initiative called Mirror On The Industry (MOTI). Now in its third year, this important, multi-faceted study explores and tracks just how representative and inclusive current television advertisements are, highlighting to the industry where improvements are needed. and how to execute authentic representation.

Partnering with Tapestry Research and Diversity consultants Versiti, Channel 4 sought to explore:

- How well minority groups are represented and portrayed in in TV advertising, looking at the disparities in representation both in and amongst members of each minority group
- How the public feels about diversity and inclusivity in advertising
- What brands can do to improve representation of diverse groups in their comms and which brands represent good practice

Since launching, MOTI has expanded in focus – it covers people from ethnic minorities, those with disabilities and LGBTQIA+, older people (particularly women), lower social grades and body diversity. These groups have been looked at both in isolation, but also the intersectionality between them.

Methodology

The study has been carefully designed, checked and refined at each point. There were number of challenges and key considerations:

- Interpretation of representation in adverts is nuanced, relying on assumptions being made. Purely counting the number of people of a certain group relies on the wider context in which they are portrayed, stereotyping, as well as our innate prejudices to understand them
- There is evidence that prejudice, tokenism and unfair representation is more likely to be noticed by those within the group being featured, than those not in the group
- Language is sensitive – how we refer to different minority groups differs depending on our background
- Understanding the landscape is not simple; every individual in the UK sees an estimated 41 adverts daily.

The methodology involves a three pronged approach:

- a large-scale audit of TV advertising, uncovering how representative the landscape is
- a nationwide survey to get the public's point of view
- qualitative focus groups to explore in depth how different groups see representation in advertising, exploring what brands can do.

It is repeated annually to build powerful trend data, guiding and influencing the advertising industry to produce more authentically representative comms

Audit

This involves watching and coding 1,000 of the most watched TV adverts from two typical months in a year. Each ad is coded second by second, utilising a comprehensive code-frame (image #1):

- Coding all lead and minor characters on screen for demographics, characteristics and details
- Denoting the presence of any minority groups in an advert, including their time on screen and role(s) played
- The nature and tone of the adverts, the purpose, and other relevant metrics

Strict testing is in place to avoid bias or prejudice. Auditors evaluate the same 50 ads at the start, so we can cross-check the results. Once we're happy with consistency, they audit the full 1,000 ads, with regular quality control checks.

We are then able to analyse these 1,000 adverts both at an ad and character level, allowing us to get a clear view of the representation of all groups.

Survey

A nationwide survey among 2,000 adults in the UK (with boosts for minority groups) allows us to find out what the public thinks about representation. The survey has been developed in consultation with people across different ages, genders, sexual orientations and ethnicities to ensure the language used throughout is inclusive.

Moreover, Tapestry's internal Diversity & Inclusion group ensures the research is designed in an inclusive way. For example, improving accessibility through not relying on purely visual stimulus (providing image descriptions when needed), ensuring our surveys are compatible for respondents using screen readers, as well as by using sensitive and inclusive (rather than intrusive) question wording for demographics etc.

The survey captures consumers' attitudes towards advertising, asking for their estimates of the current level of representation in TV adverts. It gauges their reactions to some of the results from the audit, capturing their perceptions on several of the ads and evaluating the perceived impact on the brand.

Focus groups

To further explore authenticity, tokenism, stereotyping, and cultural appropriation within ads, and better understand what brands need to avoid and do to effectively produce diverse and inclusive advertising, we conduct a series of focus groups with diversity consultants Versiti. Applying a sampling technique called 'maximum diversity sampling', we speak a to total of 36 people across 6 focus groups who are diverse in relation to age, gender, ethnicity, social grade, sexual orientation, disability, geography, and social and political views, gaining insightful discussion and views from across the spectrum.

To ensure both minimal cultural bias, and, more importantly, maximise the ability of each group to go as far as possible into the thoughts, perceptions, hopes, and fears of our participant community, moderators were chosen to 'match' participant backgrounds and heritage.

Results

This study offers a clear and compelling insight into how much progress the industry has made over recent years, how the public (and minority groups) think and react to representation, and how brands can better represent minorities.

The latest audit has revealed several positive changes to advertising over recent:

- Representation of Black people in advertising has improved, with 45% of ads now containing a black character (up from 37% in previous years), suggesting the industry has been active in improving inclusion of this group
- Representation of people with disabilities has increased. For the first time, people with physical *and* mental disabilities are being shown in more every-day situations, rather than the 'hero' or 'victim' roles seen previously
- Whilst there has been little movement in levels of representation for LGBTQI+ people, the combination of cues including celebrities, tasteful stereotypes and some explicit mentions has helped the representation of LGBTQI+ to feel more authentic and normalised this year

Despite improvements, the audit highlighted that more needs to be done across all minority groups

- Representation of ethnic minorities is heavily led by Black representation; Asian characters experience the lowest screen time of any ethnicity, often portrayed in stereotypical job roles.
- People with disabilities are vastly underrepresented, only 2% of characters have a disability, despite making up 22% of the population
- There is a lack of body diversity in advertising, 82% of characters fall into a slim/mid-sized group while under 3% fell into a plus-sized group. Plus-size characters are far more likely to be older and/or have a disability, while their slim/mid-sized and muscular counterparts were more likely to be portrayed in an aspirational way

Impact

The results are compelling and are being taken notice of, internally at Channel 4 and by the industry as a whole.


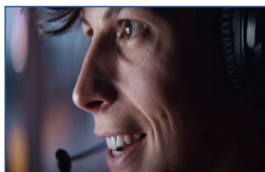
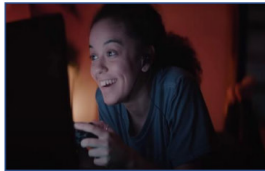
- In the past 12 months this research has been presented to a cumulative 950+ industry individuals, from Channel 4 key stakeholders, brand and agency leads, to members of leading industry bodies in diversity and inclusion, such as ISBA, The Unstereotype Alliance and The World Federation of Advertisers
- Internally, the research gives Channel 4 a thorough understanding of the advertising landscape, helping them to continue to champion unheard voices in everything that they do:
 1. It influenced Channel 4’s ‘Black To Front’ initiative, a world first that transformed every commercial break across a full day to feature only adverts with a Black lead or majority Black cast. Over 60 brands took part, helping to raise awareness and drive conversations around improving Black representation and portrayal in advertising
 2. This research is central to informing Channel 4’s Diversity in Advertising Award topic, an award that seeks to challenge the industry to create ads that authentically represent the underrepresented, offering brands and agencies the opportunity to win over £1million of free advertising. This was most recently awarded to TENA and AMV BBDO for their work educating viewers about the realities of the menopause, after last year’s MOTI study revealed older characters, particularly women, were underrepresented

- It has highlighted ways that brands can break the mould, rethinking their approach to create campaigns with real impact, ensuring ads resonate and reach influential audiences in a thoughtful and sensitive way.

Clare Peters, Client & Comms Strategy Partner at Channel 4 said:

“At Channel 4 we are committed to reflecting the diversity of Britain in our editorial content, and actively invite our commercial partners to join us on this venture too. Mirror on the Industry has opened an enormous space to invite brands into a world of better representation and portrayal by establishing where we are, where we need to go and how we get there. This project has the industry thinking, talking and most importantly, doing – this is how we create change.”

MOTI is a robust, thoughtful study with meaningful impact on an industry which touches most people in the UK. It contributed to the conversation of how representative advertising is, and influenced change in terms of the diversity of those working in advertising.

The Advert		The Characters		
				
Month first aired	February	Gender	Male	Explicit
Length of ad	30 seconds	Age	Teenager (13-18)	
Major category	Telecoms	Sexuality	Heterosexual	Assumed
Purpose	To advertise a product or service	Ethnicity	White	Explicit
Tone	Everyday, emotive	Social Grade	Impossible to say	
Style	Live-action	Disabilities	Wheelchair user	Explicit
Form	Linear story	Body type	Slim build	
		Lead Character		
				
		Gender	Female	Explicit
		Age	Teenager (13-18)	
		Sexuality	Heterosexual	Assumed
		Ethnicity	Black British	Assumed
		Social Grade	Impossible to say	
		Disabilities	No disability	Assumed
		Body type	Slim build	
		Lead Character		
		Total number of characters: 2		
		Minor Characters: 0		
		Incidental Characters: 0		