

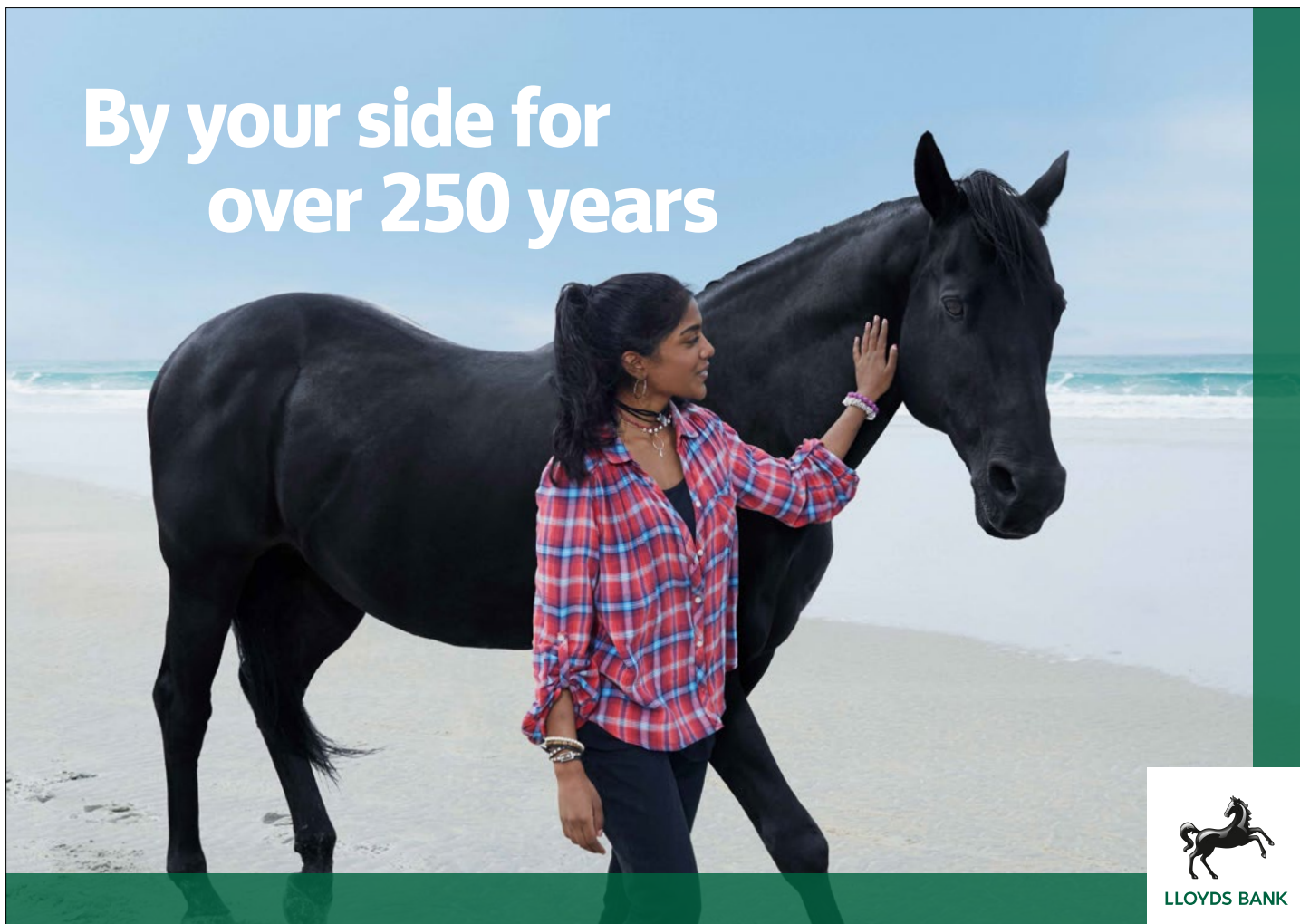
LLOYDS
BANKING GROUP



ETHNICITY IN ADVERTISING

Reflecting Modern
Britain in 2018?

By your side for
over 250 years



ETHNICITY IN ADVERTISING CONTENTS

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At Lloyds Banking Group we have a clear purpose - to help Britain prosper. This powerful commitment runs through the heart of everything we do to support the people, businesses and the communities we serve.

In 2015 we commissioned and published our Reflecting Modern Britain report - a piece of insightful research dedicated to understanding more about how advertising was reflecting Britain's diverse society.

This highlighted that the industry was under-representing minority groups and had more work to do. The research also

told us that people expect brands to represent different parts of society, and will feel more favourable towards them when they do.

Earlier this year, Lloyds Banking Group publically committed to increase the representation of B.A.M.E. (Black, Asian and Minority Ethnic) colleagues in senior management roles. We felt this was a good time to look deeper into how the B.A.M.E. community is reflected in advertising, so we commissioned this report '2018 Reflecting Modern Britain - Ethnicity in Advertising'.

SUPPORTING INCLUSION AND DIVERSITY

These latest findings show that the UK advertising industry has improved. The proportion of B.A.M.E. people in advertising has doubled, however only a small proportion of adverts feature people from ethnic minorities in lead roles.

Our Ethnicity in Advertising report is a fascinating read and provides insight into how advertisers could do more to authentically portray people from different ethnic groups.

It is thought provoking and driving me and my team to do more, to accurately reflect modern Britain. I hope you enjoy it, and I hope it inspires you too.



A handwritten signature in cursive script, reading 'Catherine'.

Catherine Kehoe

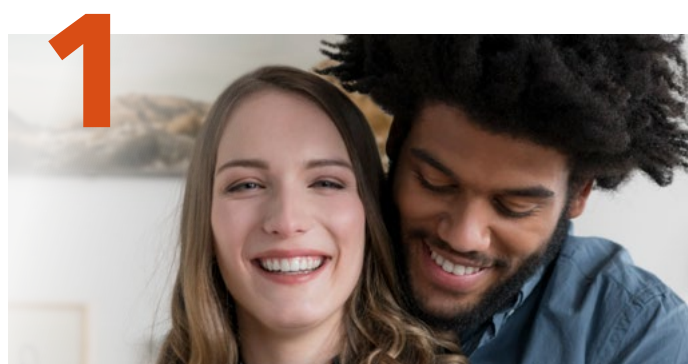
Managing Director
Group Brands and Marketing
Lloyds Banking Group

2018 KEY FINDINGS

Our latest report looks at ethnicity in advertising. This research follows our 2015 study, where we looked at how advertising was reflecting modern Britain, and provides a deeper view into the representation and portrayal of Black, Asian and Minority Ethnic (B.A.M.E.) groups and how they view their identity. Over the last three years we have seen significant

improvements, especially around representation, but this report highlights that there is still more work to be done around the portrayal of these groups, and shows where advertisers' focus should lie.

The research continues to demonstrate that customers expect to see diversity in advertising, and feel more favourable towards a brand that reflects this.



B.A.M.E. groups are better represented in advertising but often appear in supporting rather than leading roles.

Overall, representation of B.A.M.E. groups in advertising has doubled from **12%** to **25%** since 2015. These groups make up **13%** of the UK population*. However, only **7%** of lead roles are played by someone from a B.A.M.E. group.

Increased representation

2015

12%

2018

25%

But only

7%

of lead roles are played by someone from a B.A.M.E. group

And

3 in 5

adverts still feature all white or a majority of white people



Portrayal of ethnicity has improved but could go further - negative stereotyping and lack of cultural references are key areas for focus.

Since 2015, the percentage of people feeling inaccurately portrayed has reduced - by **9%** for Black people and **7%** for Asian people.

However **42%** of Black respondents think advertisers don't do enough to recognise their culture and **29%** feel that they're negatively stereotyped.

2015

43%

Black respondents who felt Black people were inaccurately portrayed in advertising



34%

2018

2015

37%

Asian respondents who felt Asian people were inaccurately portrayed in advertising



30%

2018

*2011 ONS data



**OF PEOPLE SAID THEY WOULD FEEL
MORE FAVOURABLE ABOUT A BRAND
IF IT WAS MORE REPRESENTATIVE
OF MODERN BRITAIN**

3



Ethnicity is an important identifier but it is personal and complex.

We've learnt that ethnicity is likely to be the most important identity descriptor for B.A.M.E. groups, but the scale of importance varies.

77% of Black respondents strongly identify with their classification whereas only **53%** of Asian people and **46%** from mixed race/multiple ethnic groups, felt the same.

Whilst Asian and mixed race/multiple ethnic females rate ethnicity first, we found males from these groups were more likely to identify with gender.

Standard classifications risk glossing over important cultural identifiers. A deeper understanding of people being portrayed is required, rather than taking a tokenistic approach.



**IT'S MY
HERITAGE
AND
CULTURE**

Focus group member



**GOOD TO
ASSOCIATE WITH
WHERE YOU
COME FROM**

Focus group member



Actions advertisers can take:



Be representative

Opportunity to represent broader ethnicities in adverts



Challenge clichés

Avoid negative stereotyping



Avoid tokenism

Think about the role of the protagonist and ensure they feel part of the story



**Don't shy away
from cultural cues**

Important to recognise differences in culture



Think about role models

Consider the need for broader roles for B.A.M.E. groups

OUR METHODOLOGY

The aim of this 2018 'Ethnicity in Advertising' study is to understand how accurately Black, Asian and Minority Ethnic (B.A.M.E.) groups are reflected in advertising today.

Our key questions

In this report we focused on the following three questions:

1

REPRESENTATION

Has the representation of B.A.M.E. groups in advertising improved?

2

PORTRAYAL

Are B.A.M.E. groups accurately portrayed in advertising?

3

IDENTITY

How important is ethnicity in defining identity?

This report is based on a robust study made up of three different components.



A semiotic audit

An objective review of 2,269 adverts from the top 50 advertising spenders in 2017 to see how they represented and portrayed B.A.M.E. groups in advertising.



A quantitative online survey

The online study polled 2,000 respondents in England and Wales to understand whether representation of B.A.M.E. groups has improved in advertising and to gain a clearer understanding of ethnic identity.



Focus groups

We followed up with a series of focus groups, attended by those from a broad range of backgrounds and specific B.A.M.E. groups.



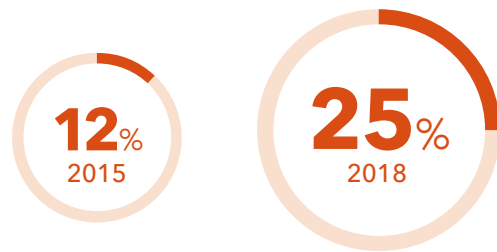
**HAS THE
REPRESENTATION
OF B.A.M.E. GROUPS
IMPROVED?**

What we found

Ethnic representation in advertising has more than doubled in the past three years. This demonstrates great progress with 25% of the people in adverts now from Black, Asian and Minority Ethnic (B.A.M.E.) groups compared to 12% in 2015.

This scale of increase is replicated across both Black and mixed race/multiple ethnic groups, with Black people today representing 13% of people in adverts compared to 5.7% in 2015, and mixed race/multiple ethnic groups representation increasing from 3.9 % to 6% in the same timeframe.

For people identifying as Asian however, the picture is somewhat different. While there has been an increase in representation, up from 2.7% in 2015 to 6.3% in 2018, Asian people are still under-represented compared to census figures which show that 7.5% of the population are Asian*. Although the representation of B.A.M.E. people in UK advertising is increasing, 3 in 5 adverts (60%) still feature all white or majority white people.



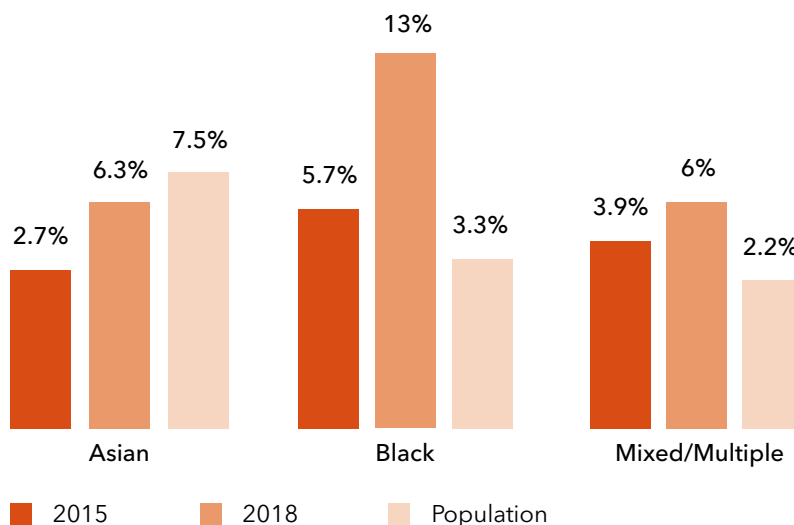
people in adverts from B.A.M.E. groups



3 in 5

adverts feature all white or majority white people

B.A.M.E. representation (2015 & 2018) versus population



Source: population figures 2011 ONS Data

* based on UK respondents only

What respondents thought

When asking people how accurately they felt represented in advertising, there is a significant difference between white and B.A.M.E. respondents. Only 13% of white respondents feel under-represented compared to over 28% for B.A.M.E. respondents.

Interestingly, despite Black people making up 13% of characters in adverts, compared to 3.3% of the population, almost a third (32%) feel they are under-represented in advertising.

This rings true with mixed race/ multiple ethnic groups too. They make up 6% of people in adverts compared with 2.2% of the population, but 29% feel they are under-represented in advertising.

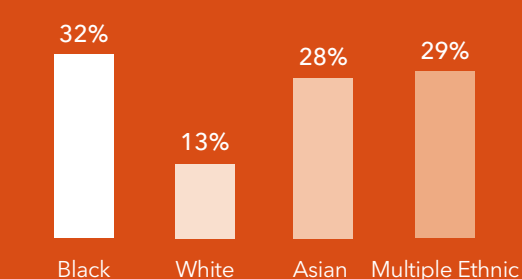
So while the numbers show progress, people aren't noticing with perceptions continuing to score fairly low and people not seeing the change.

How far do advertisers need to go?

One answer to this could be increasing the number of people from B.A.M.E. groups that play centre stage in adverts. Only 7% of adverts feature B.A.M.E. people as the dominant or main character.

It's worth noting that including people from B.A.M.E. groups as background or non-leading characters may help improve diversity statistics - but this doesn't mean that they are authentically integrated into advertisements, or are remembered by the audience as a significant part of the story.

While representation is improving, there are still clear opportunities for advertisers to place people from B.A.M.E. groups in leading roles.



% of respondents who felt that they were under-represented in advertising



Only 7% of adverts feature B.A.M.E. groups as the dominant or main character

PORTRAYAL

Are B.A.M.E. groups accurately portrayed in advertising?



What we found

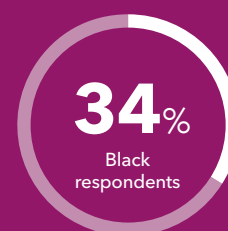
While advertisers are making progress on ethnic representation, our research shows that the portrayal of different groups still needs to be addressed. In particular, advertisers should be aware of pitfalls such as negative stereotyping or failing to recognise cultural differences.

While there are improvements for Black, Asian and Minority Ethnic

(B.A.M.E.) groups, they are still frequently portrayed as a cliché or a stereotype.

Where people from B.A.M.E. groups are included in advertising, they are rarely given lead roles, and their culture is rarely recognised.

Only 1 in 20 of adverts (5%) had a dominant message where B.A.M.E. groups were expressing pride in their ethnicity.



VS



% of overall respondents who felt they were inaccurately portrayed in advertising

What respondents thought

When asked how they felt certain groups were being portrayed in advertising, all respondents felt Asian, Black and mixed race/multiple ethnic groups were now less likely to feel 'inaccurately portrayed'.

For example in 2018, there has been an improvement of 7% on Asians' views of their portrayal, but there are still around 1 in 3 (30%) who feel inaccurately portrayed. In 2015, 43% of Black respondents felt they were inaccurately portrayed, but this improved to 34% by 2018.

There remains a large number of B.A.M.E. respondents who feel they can't relate to the people they see in adverts. And when comparing ethnic groups, it is clear to see there is further to go to offer a fair and accurate portrayal of B.A.M.E. groups, when you consider that only 9% of white respondents feel inaccurately portrayed.

A key area of concern could be not doing enough to reflect ethnic cultures in advertising, with 42% of Black people feeling advertisers don't do enough to recognise these differences.

% of respondents who feel ethnicity is inaccurately portrayed

Ethnicity being portrayed	Asian respondents		Black respondents		Mixed/Multiple respondents		White respondents	
	2015	2018	2015	2018	2015	2018	2015	2018
Asian	37%	30%	36%	25%	n/a	29%	27%	17%
Black	20%	15%	43%	34%	n/a	30%	21%	12%
Mixed/Multiple	16%	12%	21%	13%	n/a	22%	22%	11%
White	n/a	8%	n/a	12%	n/a	17%	n/a	9%

So why do B.A.M.E. groups feel inaccurately portrayed?

Respondents cited a lack of cultural recognition and negative stereotyping as issues to address in advertising.

Cultural dynamics

When people from B.A.M.E. groups were included in advertising, they were often shown with very little recognition of cultural difference, and instead were regularly shown immersed in Western culture e.g. sat together having Christmas dinner. There seemed to be little attention paid to specific cultural heritages and the contribution this has made to modern Britain. We need to move beyond this to truly represent our nation's B.A.M.E. groups.

Negative stereotypes

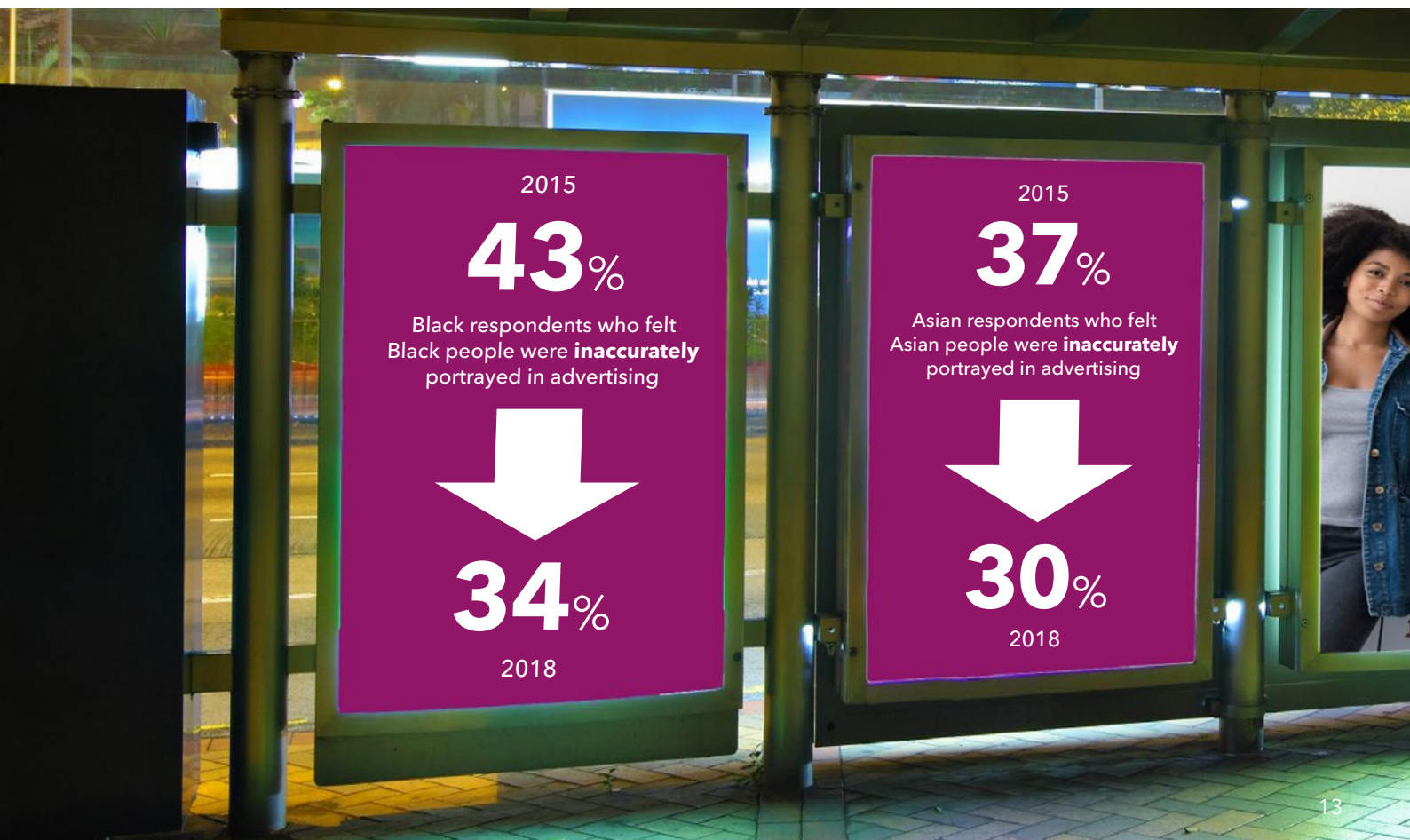
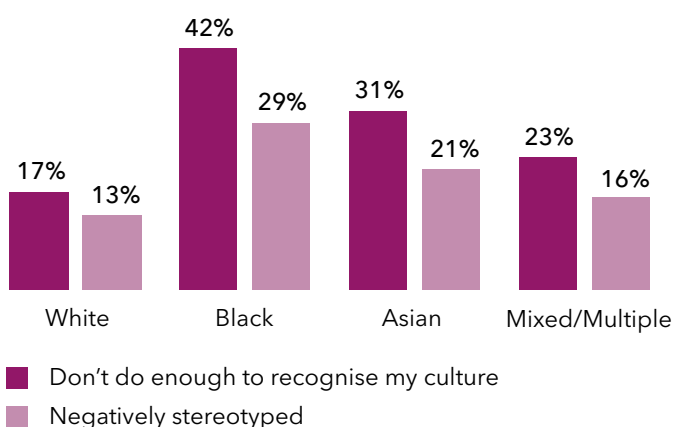
Stereotypes such as 'the angry Black girl' and 'the Black man in trainers' often elicited a negative response that more thought is needed. Clichés which show cultural differences, such as a Bollywood wedding, was seen as lazy stereotyping and not truly portraying the richness of Asian diversity. There were concerns about positioning people from

B.A.M.E. groups in service roles. It's important we position B.A.M.E. people as central characters in advertising to enhance positive representations.

Ensuring authenticity

What's key is ensuring that representation of B.A.M.E. groups is not only correct, but authentic as well. Equally important – as we'll go on to explain – is the need to understand identity and what it means for B.A.M.E. groups.

Themes contributing to portrayal issues



A photograph of two women, one younger and one older, both smiling and looking at a tablet held by the older woman. They are in a kitchen setting. The younger woman is wearing a yellow top, and the older woman is wearing a yellow top and a colorful patterned scarf. The word "IDENTITY" is overlaid in large white capital letters.

IDENTITY

How important is ethnicity
in defining identity?

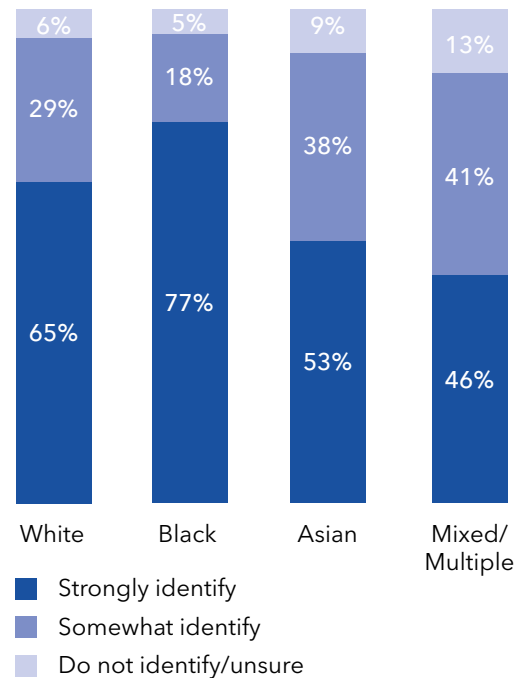
Ethnicity - a complex identifier

With positive strides being made on representation, but still further to go to accurately portray Black, Asian and Minority Ethnic (B.A.M.E.) groups in advertising, it's important to know how people identify themselves.

Identity is complex and personal, but it may not be much of a surprise that overall almost two thirds (64%) of respondents strongly identified with their own B.A.M.E. group.

Black respondents were the B.A.M.E. group most likely to strongly identify with their category (77%) whereas those who identify as Asian (53%) and mixed race/multiple ethnic (46%) did not identify with their category to such a degree. For these groups, while ethnicity is important, the power of heritage and nationality is still strong. This could be due to 'Asian' covering a wide and diverse range of ethnicities such as Indian, Pakistani and Chinese.

Identifying with the standard classifications



Ethnicity or gender?

What comes first - race or gender? It's helpful to understand how people identify themselves to be able to accurately reflect our society.

Black, mixed race/multiple ethnic groups and those who identify as Asian were all more likely to rank ethnicity first (42%, 33% and 27%) compared to only 12% of white people, highlighting the importance of representing culture and ethnicity when it comes to their identity.

Interestingly however, even within B.A.M.E. groups there are nuances. For example across genders there is a marked difference in whether they rank gender or ethnicity first. Asian, Black and mixed race/multiple ethnic females all selected their ethnicity as their top identity descriptor (32%, 47% and 38%), whereas mixed race/multiple ethnic (31%) and those who identify as Asian males (31%) both placed greater importance on gender.

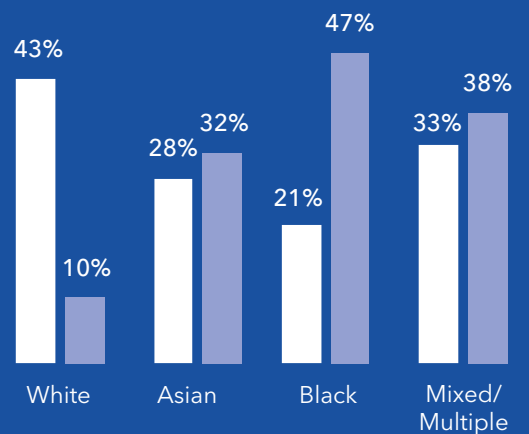
Black respondents, both male and female, selected ethnicity as their most important identifier demonstrating that 'Black' resonates more as an identity.

When comparing to white respondents there was a stark contrast with B.A.M.E. groups with both white male and females rating gender as their clear priority.

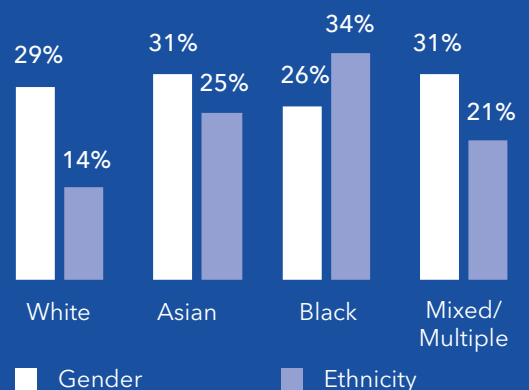
From these findings it's clear identity means different things to different people. Advertisers need to understand the nuances and expectations of their target audience to ensure the right balance across representation, portrayal and identity is struck.

Identity descriptor - % ranking gender or ethnicity first

Women



Men



SETTING AN EXAMPLE

The focus groups showed us that people do welcome advertisers who look to portray Black, Asian and Minority Ethnic (B.A.M.E.) groups authentically, and the discussions provided some insights into which advertisers had done so successfully.

Nike

Nike's recent advert, 'Nothing Beats a Londoner', harnessed London's diversity by including over 200 Londoners from different backgrounds alongside celebrities and athletes. The study found that while the advertisement was rooted in sport, it was an effective celebration of different neighbourhoods and B.A.M.E. groups.



LOOKS LIKE SOMEONE WHO UNDERSTANDS US WAS INVOLVED.

Focus group member



BBC

The BBC's Christmas advert, 'The Supporting Act', showed a schoolgirl preparing for a dance performance while her father is repeatedly distracted by work. At the performance the girl is struck by stage fright until her father joins her in the dance. While the characters' ethnicity is ambiguous, it is not the main theme of the advert and the portrayal of life as a single parent family won widespread acclaim.



THE ADVERT IS GREAT, BUT RACE IS ONLY A MINOR PART OF IT - IT'S ABOUT SINGLE PARENTS, WHAT LIFE IS ABOUT.

Focus group member



Amazon

Amazon's 2016 Christmas advert depicted a friendship between an imam and a priest. Both men suffer from aching knees and after meeting they separately send each other identical gifts of knee pads. The advert was widely praised by the focus groups for tackling a difficult subject sensitively.



YOU DON'T HAVE TO BE OLDER, AN IMAN OR PRIEST, YOU CAN IDENTIFY WITH IT.

Focus group member





Tesco

Tesco's 'Food Love Stories' campaign focused on telling the stories behind different meals. Notable was an advertisement featuring Birdie McDonald, who has fostered over 800 children across 50 years. The advert was received positively, particularly because it was assumed - or known - to be part of a series of vignettes representing different meals and B.A.M.E. groups and felt to be a universal truth representing families and food.

McCain

McCain's 2017 'We are Family' advert reflected the complexities of family life today rather than a focus on ethnicity which was seen as a strength by some respondents.



JUST SHOWS HOW THERE ARE ALL SORTS OF FAMILIES TODAY, AND THIS UNITES US.

Focus group member



MAKING A CHANGE

Our study has shown that the advertising industry is continuing to make improvements in the representation of people from different Black, Asian and Minority Ethnic (B.A.M.E.) backgrounds. Asian representation remains an area of focus, particularly when you consider how many different people fall into this group.

Equally, reflecting the ethnicity of modern Britain means more than simply including people from different ethnic backgrounds as a tokenistic gesture. And it's also important to represent people authentically, in a way

that resonates positively with the audience.

Whilst portrayal of B.A.M.E. groups has improved, there is more work to do. Success depends on a few key aspects - the use of authentic and compelling storylines is essential. Also important is avoiding assumptions and negative stereotypes, as well as considering how differences can be celebrated, rather than just being absorbed into the British culture. Instead of simply smoothing out differences, advertisers should seek out opportunities to embrace diversity by highlighting cultural differences.

Actions advertisers can take:

✓ **Be representative**

Asian groups are still under-represented in advertising. Think about how you reflect ethnicity. There is an opportunity for more frequent casting of those in B.A.M.E. groups to have a leading role.

✓ **Challenge clichés and stereotyping**

What might not seem like negative stereotyping to one person could be offensive to others, even if it feels like a positive portrayal. We found the mini focus groups really helpful in understanding how people from different backgrounds saw the character being portrayed differently. Whilst advertisers may not always conduct extensive research, there is always the opportunity to check in with people from different backgrounds.

✓ **Avoid tokenism**

Think about the role of the protagonist and ensure it feels part of a story. The most successful adverts reviewed in our research, were those with a story. Everyone could relate to the BBC story about a busy single dad and it didn't matter whether that person was Black or white.

✓ **Don't shy away from cultural cues**

Adverts which smooth out differences between people, walk a fine line between feeling inclusive and feeling like they're ignoring important cultural differences. There are a number of ways this can be delivered. It doesn't always have to be visual and can be accents or the story itself.

✓ **Think about role models**

We found when B.A.M.E. groups were included in advertising, they were often shown as sales assistants. We need to think broader about the roles people from different backgrounds have in the real world, and be representative of this.

WHY THE INDUSTRY SHOULD CARE

When people see themselves represented in advertising, this can be both engaging and empowering.

In modern Britain's diverse society, it is clear that the themes of inclusion and diversity should be at the forefront of marketers' minds when planning and developing campaigns. By recognising the value of diversity, organisations can engage customers in a way that solidifies their brand loyalty.



Lloyds' latest work on representation of people from different ethnic backgrounds shows how quickly the ad industry has moved to better reflect modern Britain. But clearly there is still some way to go in terms of portraying people's ethnicity and culture.

This new work shows, according to the British public, there are still a few clichés that persist. They tell us that greater cultural sensitivity and more thoughtful representation will make even better ads. I've been delighted to collaborate with Lloyds in their work to date and am looking forward to seeing ever more relevant advertising from the UK industry.



Karen Fraser
Director, Credos



We are delighted to see a follow up study from the previous Reflecting Modern Britain report. It provides such useful guidelines to help agencies and brands feel more comfortable in portraying diversity and inclusion for a modern day audience, that is both welcoming non-stereotypical communications and actively demanding a more accurate reflection of British society.

Reflecting and representing diversity and inclusion in our creative work remains one of the biggest challenges for our industry today. If we are hoping to attract the best talent into our industry and stay relevant to consumers through our creative work, we need to make serious adjustments.



Leila Siddiqi
Head of Diversity, IPA



We would like to thank the following for their help and support

Greenhouse
COG Research
Institute of Practitioners for Advertising
Advertising Association
Space Doctors

This report can be found online:
www.lloydsbankinggroup.com/ethnicityinadvertising

The 2015 report can be found online:
www.lloydsbankinggroup.com/reflectingmodernbritain

Please contact us if you would like this information in an alternative format such as Braille, large print or audio.

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Issue date: November 2018