

LLOYDS
BANKING
GROUP



REFLECTING MODERN BRITAIN?

A study into inclusion and
diversity in advertising



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WE'RE WORKING HARD TO BUILD AN INCLUSIVE BANK



At Lloyds Banking Group our purpose is powerful yet simple - to help Britain prosper.

And that is a commitment to all of the people, businesses and communities we serve. Which is why inclusion and diversity is a fundamental pillar of our strategy - if we don't understand and reflect the diversity of the Britain we serve, how can we help it to prosper?

Every part of our business is committed to this goal. In Marketing, we have made great strides in recent years, better reflecting the diverse nature of British society in the way we communicate. But we know we can do more, which is why we commissioned this study. To help us better understand how advertising currently reflects modern Britain, and how we in turn could do better.

What strikes me most is the simple truth that people expect advertisers to reflect diverse aspects of society, but this cannot be a simple tokenistic gesture. We need to be inclusive and authentic. This, like the whole report, is powerful insight that will shape our advertising for years to come. It is a fascinating and insightful read - I hope you agree, and I hope you enjoy it too.

A handwritten signature in black ink, appearing to read 'Catherine Kehoe'.

Catherine Kehoe

Managing Director
Group Brands and Marketing
Lloyds Banking Group

SUMMARY

In our quest to understand how to improve our advertising to better reflect modern Britain we conducted a study which used a variety of insight.

It is clear that advertising has evolved over the years. But our research has taught us how much further we still have to go. More importantly, it has also provided us with valuable insight into how we can tackle the lack of inclusion and diversity in advertising today. These are some of the key findings:

1

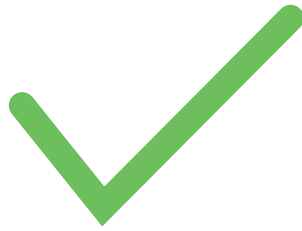
Advertising isn't seen as being representative



2

Advertising needs to do more to address challenges around portrayal





3

Marketers not only have permission to do this, we have a duty



4

Key considerations if you want to do this well

- Demonstrate inclusiveness not just diversity by showing a variety of people.
- Be authentic and ensure depiction is realistic.
- Ensure the protagonist and script lends itself to the story.



OUR METHODOLOGY

In answering our two key questions (Does advertising reflect modern Britain? Does reflecting modern Britain make a positive impact on brand perception?), we undertook a complex integrated study using a variety of research techniques:

1 A quantitative online survey

This took the form of a representative sample of **2,200** respondents in England and Wales. We included respondents from minority groups to ensure accurate representation. The questions touched on the portrayal of inclusion and diversity in advertising with specific reference to whether it was representative of modern Britain.

2 A semiotic study

We looked at the top **20** advertising spenders in 2015 to establish how well inclusion and diversity was reflected in advertising. In total, this covered over **40** brands and **1,340** TV and press advertisements.

3 A controlled online experiment

We created variations of advertising stimulus. This involved taking two scripts (one from FMCG and one from Financial Services) and rewrote them with different protagonists. These were brought to life with storyboards and voiceovers. We then tested conscious and unconscious responses with **2,220** respondents on-line to see if we could see a positive uplift in advertising outcomes.

4 Focus groups

We also followed up with a series of focus groups, attended by those from a broad range of demographic backgrounds and other groups attended by specific minority groups. ■

Whilst at Lloyds Banking Group we recognise that diversity is multi-faceted and the identities of individuals are constituted by many different factors, for the purposes of this research we have considered diversity through the lenses of; gender, age, race, sexual orientation, disability and family make-up. When we have focussed on minority groups we have included Black, Asian and Mixed/Multi-racial people, and when we have looked at disabilities we have included those registered as disabled.





**Does
advertising
reflect modern
Britain?**

**Does reflecting
modern Britain
make a positive
impact on brand
perception?**

ADVERTISING AS AN EVOLUTION

Over the last four decades, the UK advertising industry has evolved beyond recognition.

Working with the History of Advertising Trust, we were able to look back at advertising from the 1960s to the present day. Reflecting on these advertisements, it is interesting to see how these themes have emerged for the different decades.

Whilst the 60s was the era where women began to have a voice, diversity was still not readily presented in advertising and showed a limited view of their aspirations as we can see with the Lloyds Bank example. Women were shown mostly in the roles of housewife and mother and in the shadow of their husband.

During the 70s there was a greater move away from women in household roles. However this was replaced with the sexualisation of women and showing them more as objects of desire.

In the 80s we began to see broader diversity being approached in advertising with the representation of ethnicity. Benetton stood out as an advertiser who was both provocative and brave. The fashion retailer's eye-catching advertising signalled the beginning of an era which saw an

increase in the ways in which those from ethnic backgrounds were portrayed.

Towards the end of the 90s the first advertisement featuring a gay couple was introduced to our screens via Elida Faberge Impulse body spray. This approached sexual orientation through the lens of humour. The advertisement featured a young lady and a flirtatious encounter with a handsome young man who knocked her shopping out of her hand. Despite the admiring glances between the two he turns out to be



60s

Lloyds Bank (1961)



00s

Leonard Cheshire (2007)

gay and walks off hand in hand with his boyfriend.

Historically mainstream advertisers have struggled with the inclusion of disability. Where we have tended to see disability represented it is the subject of the advertisement itself. Leonard Cheshire is an early example of this from the 90s. However, we have recently started to see advertisers tackling the inclusion of disability with Maltesers being an excellent example of this. =



THE ARCHIVES ARE A BAROMETER OF SOCIAL ATTITUDES, ASPIRATIONS, FASHIONS AND TRENDS AND PROVIDE INSIGHTS AND COMMENTARIES ABOUT THE TIMES AND CULTURES THAT CREATED THEM.

Jane Jarvis

History of Advertising Trust

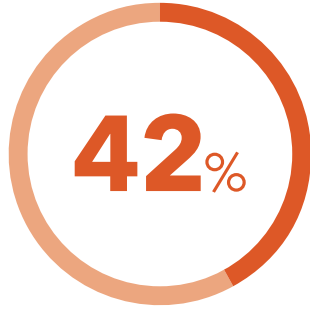


Now

Maltesers (2016)

REFLECTIONS ON **MODERN** BRITAIN





of marketing professionals believe that the work they produce doesn't reflect contemporary society

Marketing Week
(November 2015)

Before we can move forward, it's important to take a step back.

Advertising isn't just a tool that we use to inform and engage an audience. When we use advertising to evoke a feeling, tell a story or deliver a message, we hold a mirror up not only to ourselves but also the culture and values of the moment.

We live in a changing society where the definition of family is blurring and people are working longer. It's crucial we recognise these trends and reflect them accurately in our advertising. Why? Because if we misrepresent them, then we risk alienating our audience. And our brands will suffer as a consequence.

We've come a long way in recent years but advertisers have to take inclusion and diversity more seriously and think carefully about how they portray the diversity of modern society. ■



WHERE WE ARE TODAY

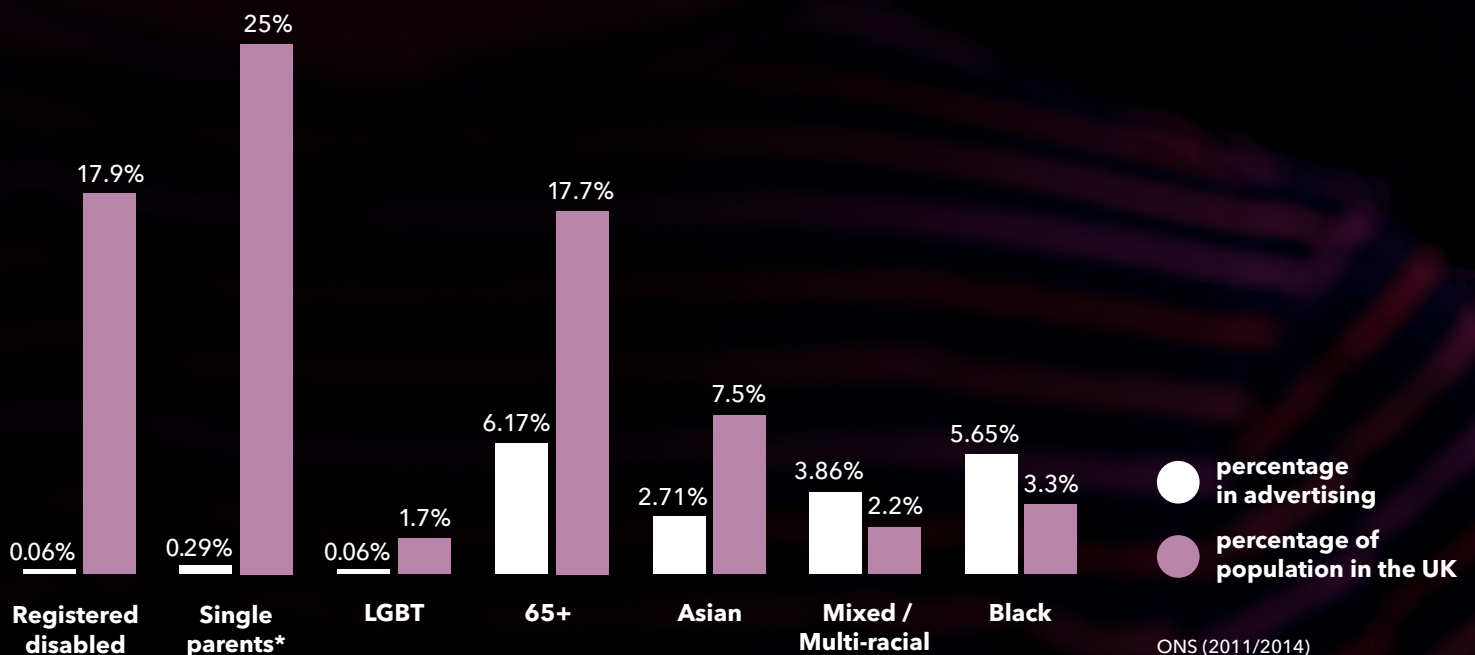
How inclusive is UK advertising?

Looking at how today's advertising represents and portrays minority groups was the first crucial step of our study. To do this we looked at the top 20 advertising spenders in the UK in 2015 and established how they represented themes such as family make-up, gender, age, ethnicity, disability and sexual orientation in their work.

After reviewing over 1,300 advertisements from over 40 different

brands the results were startling. Less than 20% of people featured in advertisements included people from minority groups. In fact there were very few advertisements with obvious cues which represented single parents, disabled people, gay and bisexual people, making it hard to identify them. Our subsequent findings on portrayal examined why these themes can be difficult to identify.

% of each group in the UK population vs. in advertising



* Single parents as a proportion of families with dependant children



Banking on diversity

When focusing on advertising in the banking industry, our researchers found that minority groups were similarly underrepresented. While there was some representation of older people and different ethnic backgrounds, the advertisements surveyed had little or no representation of other minorities. ■



of the people featured in advertisements included people from minority groups



OUT OF SIGHT

Out of sight can sometimes mean out of mind leading to an underrepresentation in modern advertising.

It can be challenging for advertisers to represent certain groups such as single parents, gay, bisexual and transgender people (LGBT) without a clear story or resorting to visual cues. The risk here is being stereotypical. When it comes to disability it's rarely seen and when it is, this tends to be a physical disability, yet a large proportion of disabilities may not be visible, making this challenging. =



THOUGH PEOPLE STILL EXPECT, AND ENJOY, ASPIRATIONAL IMAGES IN ADVERTISING, THEY WANT TO SEE PEOPLE OF ALL BACKGROUNDS AND COMMUNITIES REPRESENTED.

Karen Fraser
Credos



We found that:

- The traditional nuclear family was largely displayed as the ideal, with few identifiable examples of single parent families.
- LGBT people were rarely visible.
- Disability was rarely shown. If depicted, it was represented as a physical disability.

GENERATION SAGA

We found that when older people are depicted in advertising, they are usually presented in traditional grandparental roles.

In advertising today, older people typically play the role of the wise, generous, engaged parent or grandparent in a nuclear family.

As a result, there is a very limited range of personalities, roles and interests.

Older people were mostly included in the advertisements we analysed when the relevant brands had an older target audience. And when they were, they were frequently represented with older, well-known professional role models. It was rare for an older person to be portrayed humorously or promoting technology or innovation. ■

17.7%

of the
population
are currently
aged over 65



By 2039, that
figure will rise to

24%


ONS (2016)



ADVERT STREET
SE1



MUM'S THE WORD

A photograph of a woman and a young girl, both with their hair styled in large, pink hair curlers. The woman is smiling broadly, her eyes closed, and the girl is kissing her on the cheek. They are both wearing pink clothing. The background is a bright, out-of-focus indoor setting.

A lot has
changed for
women in
the last 50
years. But has
advertising
kept pace?



One of the most striking statistics that came out of the study was that of the advertisements we reviewed, only 33% of the people featured in advertisements were women.

In the advertisements we analysed, women rarely occupied positions of power and when they did the role was often linked to seduction, beauty or motherhood.

By contrast, if a woman didn't conform to what society considers to be beautiful, then their advertising role was reduced to that of a joker.

In addition, it is important to note that in the advertising we viewed, there was no representation of people with non-binary gender identities. ■

51%
WOMEN

49%
MEN



33%
WOMEN

67%
MEN





THE MINORITY REPORT

One-dimensional portrayals of ethnic minorities have become established as the norm.

Our research shows that when Asian, Black and Mixed/Multiple ethnic groups are represented in advertising, they are portrayed with a strong British identity and integrated into British culture.

There is a lack of diversity in cues such as the language and accents they use, the clothing they wear, the religion and rituals they practise as well as the food they eat.

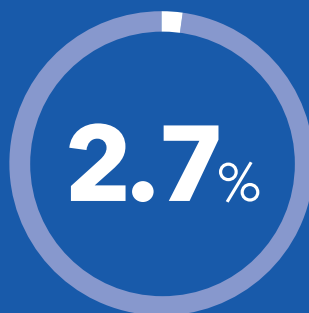
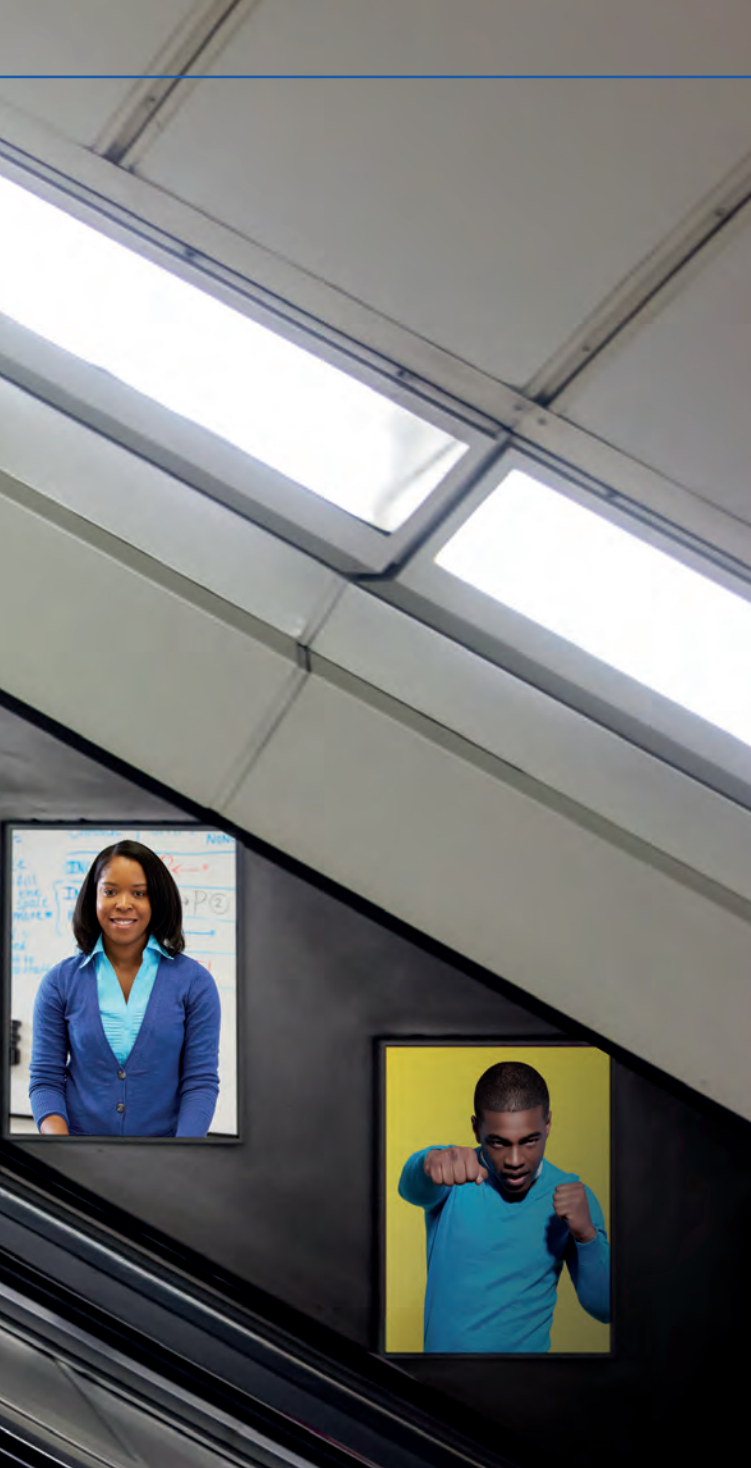


**of the people featured
in advertisements were
Mixed/Multiracial**



**of the people featured
in advertisements
were Black**

Our research has also found that Black people are often shown in a limited number of roles such as salesperson, teacher, musician and sportsperson. ■

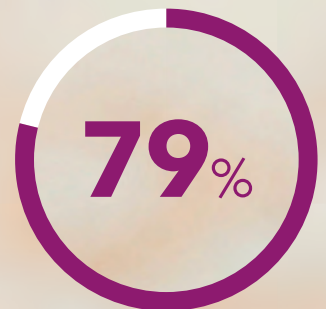


**of the people featured
in advertisements
were Asian**



HOLDING UP A MIRROR

Your customers aren't just noticing their underrepresentation, they're recognising the marginalisation of others as well.



**of all respondents
believe gay women
are underrepresented
in advertising**



Representation

The majority (79%) of our respondents felt that gay women were a group underrepresented in advertising. This contrasted with the 49% who felt that gay men were absent from advertising, while 56% believed that there weren't enough bisexual people in advertising.

Nearly half of respondents believe that disabled people were underrepresented in advertising.

Respondents felt Asian, Mixed/Multi-racial and Black people to be underrepresented by 35%, 31% and 27% respectively. ▶



IT'S RARE TO SEE DISABLED PEOPLE IN ADVERTISEMENTS.

Research respondent

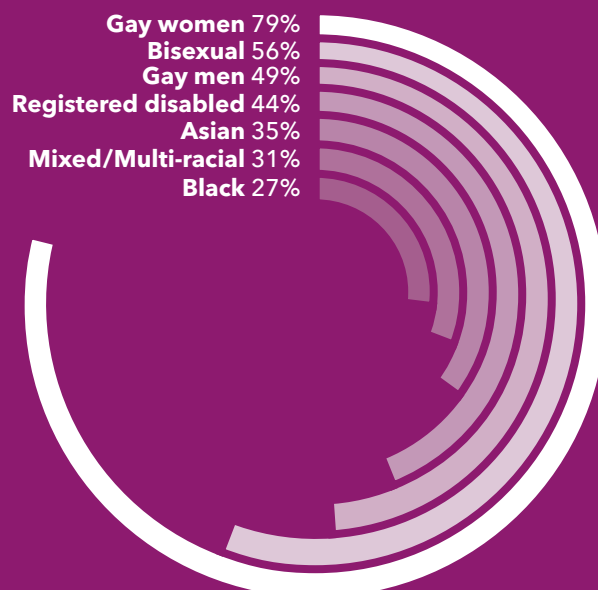


I CANNOT THINK OF ANY ADVERTISEMENTS FEATURING GAY PEOPLE.

Research respondent



Percentage of respondents who felt groups are underrepresented in advertising



Portrayal

One of the most startling findings of our report was that only 47% of all our respondents felt advertising reflects them accurately.

The percentages declined further among respondents from minority groups. Only 21% of gay women felt accurately portrayed, while people over 45 felt less accurately portrayed than younger respondents. Interestingly, respondents who were not part of the typical 2.4 family structure were less likely to feel that advertising portrayed them accurately. And only 39% of those registered disabled or who have someone living with them that is disabled, felt accurately portrayed. =



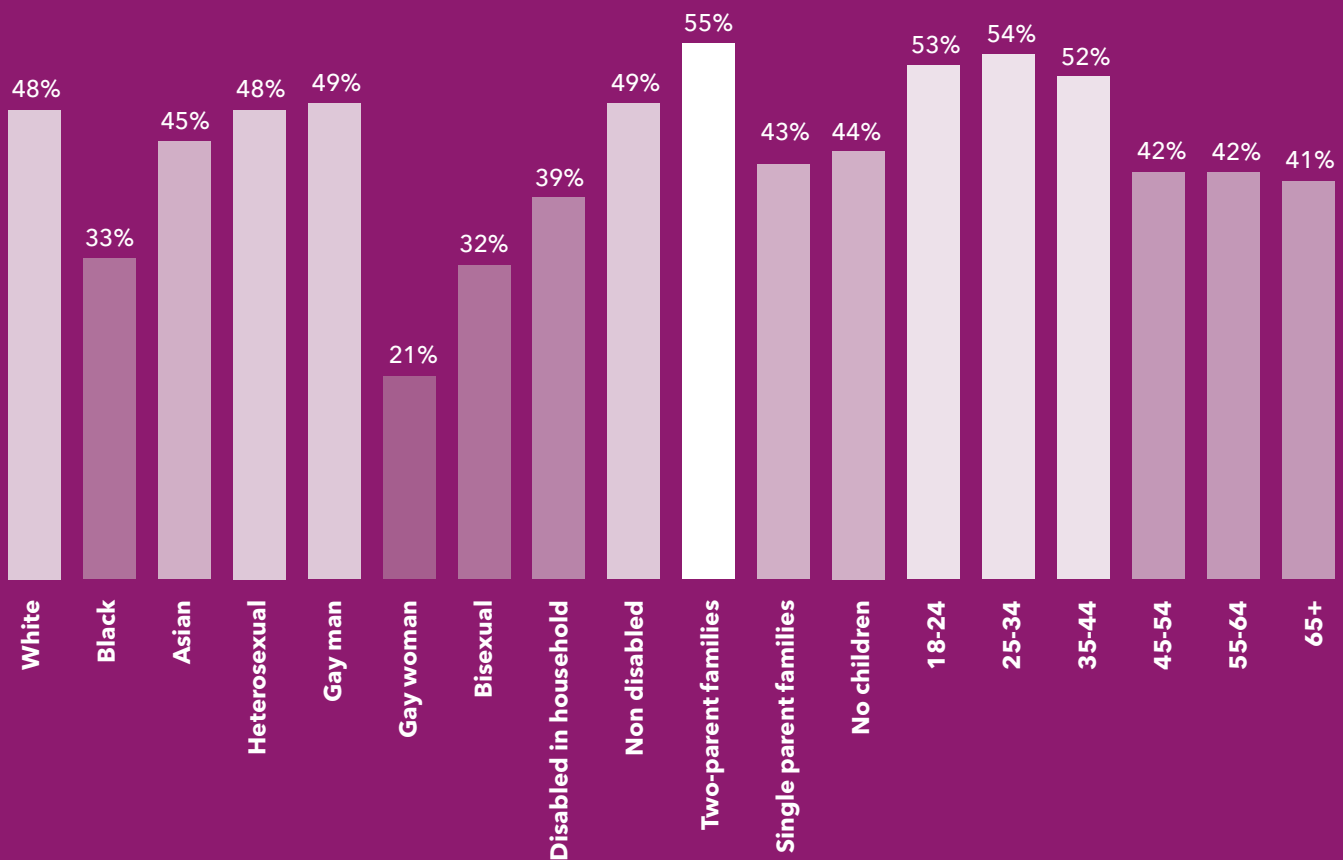
THEY OVER EMPHASISE CERTAIN TRAITS TO MAKE THEM LOOK GAY OR BUTCH.

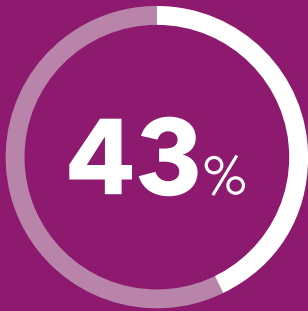
Research respondent



of gay women felt accurately portrayed

Proportion of respondents that felt accurately portrayed in advertising





of single parents felt they were accurately portrayed, versus 55% of two-parent families



THERE IS MORE THAN ONE DISABILITY, WE AREN'T ALL IN A WHEELCHAIR.

Research respondent



I AM 64 BUT PORTRAYED AS A WHITE HAired TECHNOPHOBIC GARDENER. MY HAIR IS BROWN, I LOVE TECHNOLOGY AND DANCING.

Research respondent





RESPONDING TO THIS CHANGE

Understanding and reacting to
your customers' needs is crucial.



WE THEN
TESTED BOTH
CONSCIOUS AND
SUBCONSCIOUS
RESPONSES
TO ESTABLISH
WHETHER WE
COULD DRIVE A
POSITIVE UPLIFT.



What we did

For the final stage of the research we created stimulus to test in both quantitative and qualitative research. We took two TV scripts, one for Financial Services and one for FMCG and re-wrote them with a different protagonist representing the different minority groups. These were brought to life with story boards with voice overs.

We then tested both conscious and subconscious responses to establish whether we could drive a positive uplift. This was followed up with focus groups, where we explored the stimulus we had created together with some examples of advertising we believed where good examples of being inclusive.

What we learnt

Following on from our earlier learnings, we were expecting to see an uplift when respondents viewed the stimulus including protagonists from minority groups we had created.

However, after completing our tests it became clear that there was limited difference between respondents seeing the original stimulus and the test variant either consciously or unconsciously. The only difference was a slight uplift in favourability scores amongst those seeing the disability stimulus and a lower favourability score from those seeing the LGBT stimulus. The reason behind this became clearer

when we discussed this in the focus groups.

When we pointed out that we had tried to include more minority groups, many in the focus groups felt that this was both tokenistic and unrealistic. Rather than creating inclusive advertising, some groups felt singled out for their differences. In some cases, the respondents didn't feel as though the scripts featuring the different protagonists were believable. The single parent group typified this by questioning the script featuring a single father by saying that the story didn't ring true at all. ■



RATHER THAN CREATING INCLUSIVE ADVERTISING, SOME GROUPS FELT SINGLED OUT FOR THEIR DIFFERENCES.



Why should the advertising industry care?



THE SINGLE PARENT GROUP [SAID] THAT THE STORY DIDN'T RING TRUE AT ALL.



THE BEST IN CLASS

To see how our focus groups would react to more inclusive advertisements, we showed them some examples of what we considered to be best in class.

Working with COG Research and Adam & Eve DBB we identified what we believed were good examples of advertisements representing minority groups.

Most groups reacted with a positive emotional response, stating how impressed they were with how the advertisements handled inclusivity combined with storytelling.

The group said that the emotional reactions that they experienced were down to the stories conveyed and not just the characters. This led onto a discussion about advertisers having a duty to be more inclusive. One group member even said they needed it to make her children feel normal.



Above: 'Learning Sign Language' Wells Fargo (2015)

Wells Fargo - Learning Sign Language

The Wells Fargo advertisement has a narrative that has disability at its centre so this minority is integral to the story. The advertisement also features two women as a couple but this too fits with the story of the necessity to adopt a child. This is a great example of inclusivity with advertising putting the story first.



**IT TOUCHES EVERYTHING
IN ONE SUBJECT.**

Research respondent





Guinness - Sapeurs

Guinness tell the story of a minority so that instantly the advertising doesn't feel tokenistic or contrived as the advertisement has engulfed the viewer in that world and culture.



**THEY'RE ALL
COMING TOGETHER.**

Research respondent



H&M - Closing The Loop

What Swedish H&M has managed to do is bring together many different people, so that the advertisement feels inclusive rather than tokenistic. The advertising construct lends itself well to vignettes in this way and H&M show themselves as a brand who is accepting of all.



**YOU COULD BE WHO YOU
WANT, IT'S APPEALING TO
ALL TYPES OF PEOPLE.**

Research respondent



McDonald's - You're Alright

McDonald's has long been ahead of the game when it comes to diversity within their advertising. Because this is recognised by the public, they are allowed to explore individual stories that feature minorities (in this case single parent families) which then add up to something much bigger. =



**McDONALD'S BRINGS
PEOPLE TOGETHER.**

Research respondent





Planning for inclusion and diversity success.

By listening to, and observing our focus groups' positive reactions to the best in class advertising examples, we were able to understand the steps needed to successfully consider inclusion and diversity in a marketing campaign.

The focus groups' respondents were impressed with how all the examples

approached diversity in an original and inclusive way. The overarching comment was that strong and authentic storytelling was key to an advertisement's success.

From a marketer's point of view, the actions are clear. The themes of diversity and inclusion have to be considered from the outset and at each stage of a campaign's development – planning, execution and review. ■



Action checklist for marketers

When building a creative campaign that accurately represents your audience you must:



Demonstrate inclusivity, not just diversity, by showing a variety of people.



Be authentic and when including a minority ensure the depiction of the character is realistic.



Ensure the protagonist and script lends itself to the story.



IT IS CRITICAL THAT WE EMBRACE THE DIVERSITY OF OUR CUSTOMER BASE AND THE COMMUNITIES IN WHICH WE OPERATE AND THAT WE REFLECT THIS IN ALL OF OUR CUSTOMER COMMUNICATIONS.

Catherine Kehoe
Lloyds Banking Group



MAKING A **CHANGE**



Transformational change starts from within
and we're making a step change to altering
the way we approach inclusion and diversity
in our advertising.



Insight to action

Planning

We commit to broadening our minds about who our customers really are and enhancing the available insights. When conducting focus groups, we will look to include and seek feedback from customers of diverse backgrounds.

Execution

We will embed this new way of thinking into all the key stages of our campaign development from adapting brand guidelines and photography and casting guidelines through to campaign briefing.

Review

This is not about meeting a quota. It is about being more consciously aware. We'll review our advertising through the lens of inclusion and leverage the partnerships we have in place with organisations who represent minority groups.

In conclusion of our integrated study, we found that advertisers need to do more to represent and reflect modern Britain in advertising. Respondents told us that they felt certain groups were underrepresented in advertising and called out inaccuracies around how they were being portrayed, particularly if they were from a minority group. These findings were backed up through our own objective analysis of the advertising landscape in 2015.

Appreciating the biggest challenge for any advertiser is how to reflect and represent diversity without being stereotypical or at worst tokenistic; we learnt it's not as simple as re-writing a script to include a protagonist from a minority group, as our research did

not drive any positive impact. It led to either low involvement or, at worst, feelings of segregation for the minority and some audiences felt they were being educated on their prejudice.

By exploring the issue in focus groups we now understand that advertisements should focus on inclusivity not just diversity, and that we need to be authentic and ensure the depiction of the character is realistic and driven from the story itself.

The overriding feelings from consumers was that advertisers have a duty to reflect the diverse British culture we now live in. With this in mind, we are now making changes to address this, and with the support of advertising industry partners, we hope we can inspire other advertisers to do the same. ■

WHAT THE INDUSTRY THINKS



In the work Credos has done on portrayal in advertising we've seen a consistent theme emerge: though people still expect, and enjoy, aspirational images in ads, they want to see people of all backgrounds and communities represented.

Many of our leading practitioners know this instinctively. They know that challenging expected norms can provide intrigue, humour and delight - the very stuff good ads are made of.

Now, this new report offers new insight to support those instincts. It will give inspiration when ads are developed. It will provide evidence if creative work is questioned. It will encourage our industry to defy traditional depictions still further.

The good news, of course, is that such representation brings rewards. In recent years, some of our industry's most awarded and successful ads have challenged stereotypes head-on. They have questioned how women and girls are thought of, and built compelling stories around how previously overlooked members of society are represented. In so doing they have contributed to shaping our values and, ultimately, our society.

We look forward to taking this message to our supporters and colleagues, and to seeing even more exciting, innovative and effective ads created as a result.

Karen Fraser

Director, Credos, Advertising's think-tank



Over the last four years we have begun to make some progress as an industry, with a growing number of advertisers beginning to reflect a more diverse and inclusive picture of modern Britain. We are only at the start of that journey, but I hope that when we look back on the 2010s we will see it as a decade when this became the norm, rather than the exception.

Matthew Goff

Managing Director, Adam & Eve DDB

“

IN RECENT YEARS, SOME OF OUR INDUSTRY'S MOST AWARDED AND SUCCESSFUL ADS HAVE CHALLENGED STEREOTYPES HEAD-ON.

”



The History of Advertising Trust's archives are an invaluable resource, holding fascinating brand, agency and research collections charting the industry's history from the 18th century to the present day. The archives are a barometer of social attitudes, aspirations, fashions and trends and provide insights and commentaries about the times and cultures that created them.

Over the years, language and production styles have changed and stereotypical concepts of gender, age, cultural group or class identities have been used – or avoided. Today, many advertisers strive to be inclusive, to portray and describe people realistically and to show the

diversity present in our society. The way advertisers approach this task has changed over time in accordance with evolving social and cultural attitudes as well as regulatory developments in the advertising industry.

Jane Jarvis
History of Advertising Trust

A good measure of how far we've come is in our portrayal of diversity in the creative work we produce. Commercial brands that do air non-stereotypically diverse executions are almost by default likely to attract more goodwill, comment, earned media value and social sharing.

Earlier in 2016, the IPA set the industry diversity targets aiming for higher gender and BAME representation in leadership positions by 2020. Now all the big agencies are making completely public their record on diversity, which encourages competition and discourages complacency.

In order to help achieve these targets the IPA recently launched a Diversity Hub (www.ipa.co.uk/diversity) that makes the business case for diversity and provides quick and simple recommendations, which can be actioned immediately. The Hub also acts as a platform to promote the good work that's already being done and as a facilitator that puts agencies in touch with trustworthy networks and allies who specialise in different strands of diversity, whether it's gender, ethnicity, sexual orientation, unconscious bias etc.

Injecting diversity through our talent pipelines is crucial to futureproof our businesses. To this end, we are expanding our apprenticeship programme, Creative Pioneers, which recruits over 25% of its candidates from BAME backgrounds.

The Reflecting Modern Britain study highlights the importance of inclusion and we look forward to collaborating and sharing best practice with our agencies and clients at a time of major global change. ■

Leila Siddiqi
Head of Diversity, IPA



**TODAY, MANY
ADVERTISERS STRIVE
TO BE INCLUSIVE,
TO PORTRAY AND
DESCRIBE PEOPLE
REALISTICALLY.**



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We would like to thank the following for their help and support in the development of this research and report:

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- Advertising Association
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- COG Research
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