



MIRROR

ON THE INDUSTRY

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Foreword

For over 40 years Channel 4 have been creating change through entertainment. We're calling on brands to inject a little bit of our remit into their advertising.



"At Channel 4 we believe deeply in our role as a catalyst for positive social impact. Mirror on the Industry is more than an ad audit; it's our commitment to expose where advertising still falls short, and to light up the path forward. We want advertisers and agencies to see us as more than a media owner, we're your partner. We want to walk alongside you in your DEI journey. When levels of representation are greater and portrayal is more authentic, and more inclusive, the stories we tell become richer, the connections stronger, and the business case undeniable."

**– Rak Patel, Chief
Commercial Officer at
Channel 4**

Represent 
unheard voices

Challenge 
with purpose

Reinvent 
entertainment



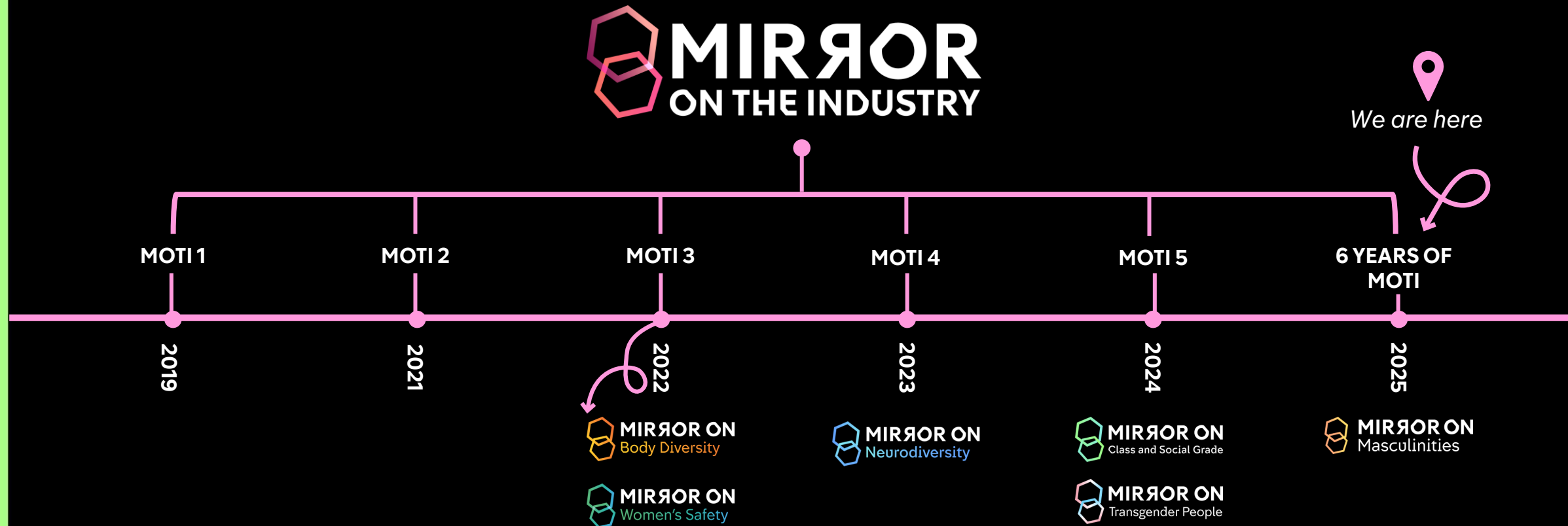
Introduction

Mirror On The Industry (MOTI) is Channel 4's award winning insight initiative that tracks the levels of representation and quality of portrayal in UK TV advertising.

MOTI launched in 2019 to see if the UK's TV advertising was as inclusive as the industry said it was...spoiler alert, it wasn't. So, we've been tracking representation and portrayal in ads ever since, not only to hold us accountable and remain informed on where and how to improve, but to celebrate the wins too. So, here we are 6 years since our first report with lessons and celebrations in tow.

Over 6 years we have collected a vast amount of data on representation, leaving us with 'too much' to give you in a single report. So, in 2022 we launched the 'Mirror On...' series, to start giving individual groups deeper focus.

Ultimately, this insight initiative is Channel 4's gift to the industry. Rooted in our remit and developed to inspire us all to improve representation in advertising.



We have some headlines for you...



The good news

Audiences feel progress. Across the UK, audiences are noticing better representation of different groups in advertising, and it matters to them. Even in a climate of division and media-amplified intolerance, engagement with DEI remains high. The good news is simple: inclusion is being felt, valued, and expected, proof that meaningful change is resonating with audiences nationwide



The 'no new news' news

Representation is stagnant for some groups. LGBTQIA+ people and Disabled people have seen little to no improvement over six years. Disabled people remain stuck around 4% of ads featuring them, often framed only through charity. The story isn't new: for some audiences, inclusion simply isn't moving forward.



The opportunity news

Opportunity lies in three key places. First, in improving how ad formats, such as montages, are used, ensuring representation goes beyond fleeting moments. Second, in balancing aspiration with relatability. Third, in addressing the "missing persons" who remain unseen on screen. When brands invest in authentic, connected portrayals, advertising does more than reflect society, it drives social change, strengthens brand outcomes, and delivers measurable financial gain.



Methodology

Mirror On The Industry is built on 6 years of rigorous advertising audits, consumer surveys and qualitative conversations.

MOTI is conducted with our research partners at Tapestry. Trained auditors review ads second by second, interpreting them as the average audience would, assessing both explicit and implicit cues to understand who is on screen and how they are portrayed.

To deepen insight, we connect with consumers biennially with an in-depth survey, and in our earliest waves we conducted qualitative research to explore public perceptions around representation in TV advertising.

6,000

top UK TV ads audited

We audit 1000 UK TV ads from the previous year, annually. The ads are selected by highest adult impacts in March and/or September, for tracking consistency and to minimise impact of seasonal events. Our extensive code frame covers both advert level and character level detail.

Advert level coding captures the overall context: ad format, purpose, sector, tone and themes or narratives.

Character level coding records who appears on screen across demographic and identity markers, what role they play (lead, minor or incidental), how they are portrayed, whether they are speaking and how long they are on screen for.

12,000

consumers surveyed

We conduct a survey biennially among a nationally representative UK sample. Our latest survey was conducted between 25th April – 6th May 2025.

The survey explores attitudes and perceptions towards DEI more broadly and within advertising, focusing on how well different groups in society are represented and portrayed.

While we have evolved the survey over time to add new lenses, we have kept some core questions consistent in recent years to track attitudinal shifts.

66

qualitative participants

In MOTI's first two waves we conducted focus groups to explore diversity in TV ads, focusing on authenticity, tokenism, stereotypes, and cultural appropriation.

We utilised maximum variation sampling and discussed over/under underrepresentation, good and bad portrayals, and whether advertising reflects modern Britain.

These conversations highlighted tensions between commitment to inclusion and fear many brands have around backlash.

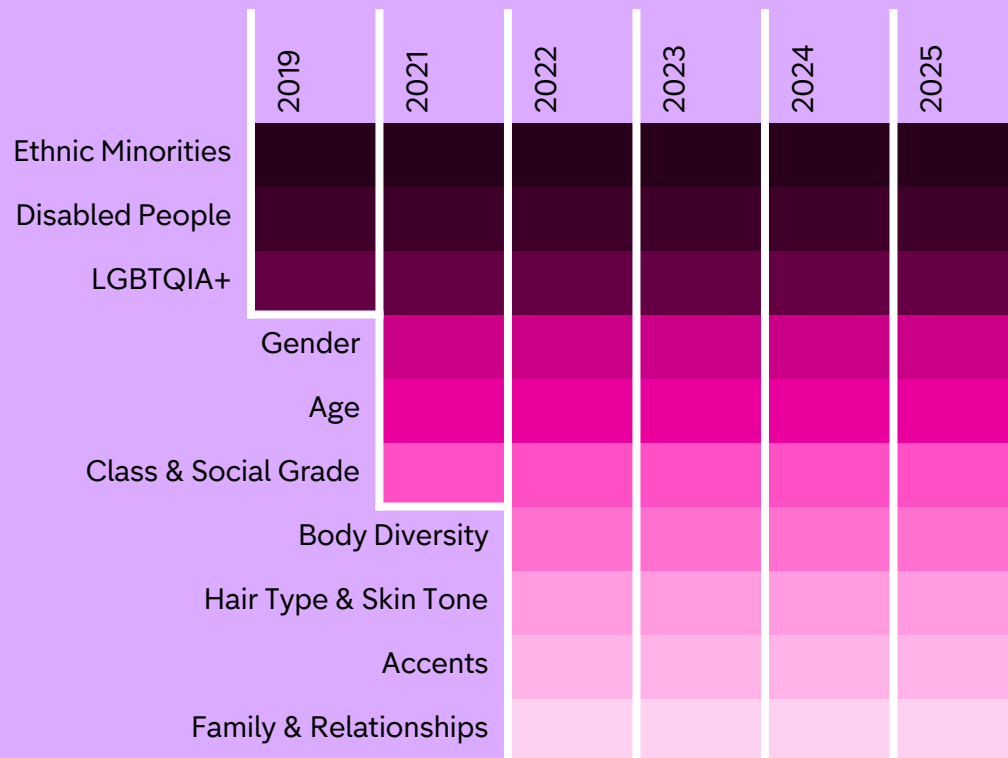
We've been tracking a variety of groups in ads

Over the years we've expanded the groups we looked at and evolved the language we've used.

MOTI's code-frame has expanded to capture richer detail on who appears in TV ads. Coding language and definitions have remained consistent, only evolving when essential to avoid skewing trends. Every characteristic is coded as explicit or assumed, reflecting how audiences make inferences based on explicit and subtle cues.

To avoid overcounting, our code-frame also use codes like "impossible to say," ensuring accuracy without forcing judgments. This approach balances consistency with flexibility, providing deeper insights into representation while maintaining comparability year on year.

Groups and characteristics we've tracked and reported on over the years...



A note on language and grouped analysis in this report:

Minority Groups

Minority Groups in this report refers to grouped analysis on Disabled, LGBTQIA+ people and ethnic minority groups.

Ethnic Minorities

This report refers to the collective group of ethnic minorities, but analysis is also split by separate ethnic minority groups in acknowledgement that this is not one homogenous group.

Disabled People

This report uses Disabled people rather than people with disabilities, aligning with the social model which highlights how structures and attitudes disable people.

LGBTQIA+

LGBTQIA+ refers to lesbian, gay, bisexual, transgender, queer or questioning, intersex, and asexual people, with the "+" symbol recognising the many other sexual orientations, gender identities and expressions. While analysed collectively due to low representation, we acknowledge the need for nuance and standalone work, e.g. Mirror On Transgender People.

Class & Social Grade

Moving away from hierarchical 'higher/lower' social grades, this report uses working class and non-working class.



Still in the Room:

Has the discourse around DEI
changed the way people feel about it?

A lot has happened over the years

Since 2019 many major events have pulled issues of DEI to the fore, but recently media has been questioning its place.

Since MOTI began, there has been a consistent stream of events putting DEI under the microscope, often through controversy. In 2025, this has intensified: Trump mandated DEI rollbacks¹, reform supporters are gaining visibility², and anti-immigration protests dominate the headlines³.

Increasingly, headlines frame intolerance as if it represents the majority, questioning the longevity of DEI in the UK. Against this backdrop, we are left asking: does inclusion still matter to people, and how resilient is public commitment to diversity, equity and inclusion in the face of seemingly growing resistance?

Is DEI about to DIE?⁴

DEI is dying, but the damage to the next generation has already been done⁵

Trump style DEI crackdown could happen in the UK, experts say⁶



The UK hold great pride in their identities

Despite divisive headlines, pride in identity and connection to DEI remain prevalent for the UK.

The majority remain proud of their identities. Yet for too many, being accepted still means hiding part of who they are, almost a third of the UK have said they've felt this pressure. These realities remind us why DEI is not optional; they are essential to the strength of our society.

Despite headlines questioning DEI, public opinion tells a different story: support is strong, experiences are real, with many agreeing that issues relating to DEI are important to them and that they are personally affected by issues relating to DEI.

4 in 5

UK adults are proud of their identity

80% 2025, 77% 2023 ⁷

Most people in the UK say identity is a source of pride, so it's important that we celebrate this. But pride for some should not come at the cost of others feeling they need to hide parts of their identity to be accepted in society, of which 30% of UK adults feel.

2 in 3

UK adults say issues relating to Diversity, Equality & Inclusion are important to them

67% 2025, 69% 2023 ⁸

UK adults believe DEI issues matter. This commitment has barely shifted since 2023, showing that public support is resilient even when headlines suggest otherwise. DEI is not a passing concern; it remains a core value.

2 in 5

UK adults say they are affected personally by issues relating to DEI

39% 2023 & 2025 ⁹

With many personally affected, the reality of exclusion touches over a third of our population, underscoring why progress cannot pause and why inclusion benefits us all.

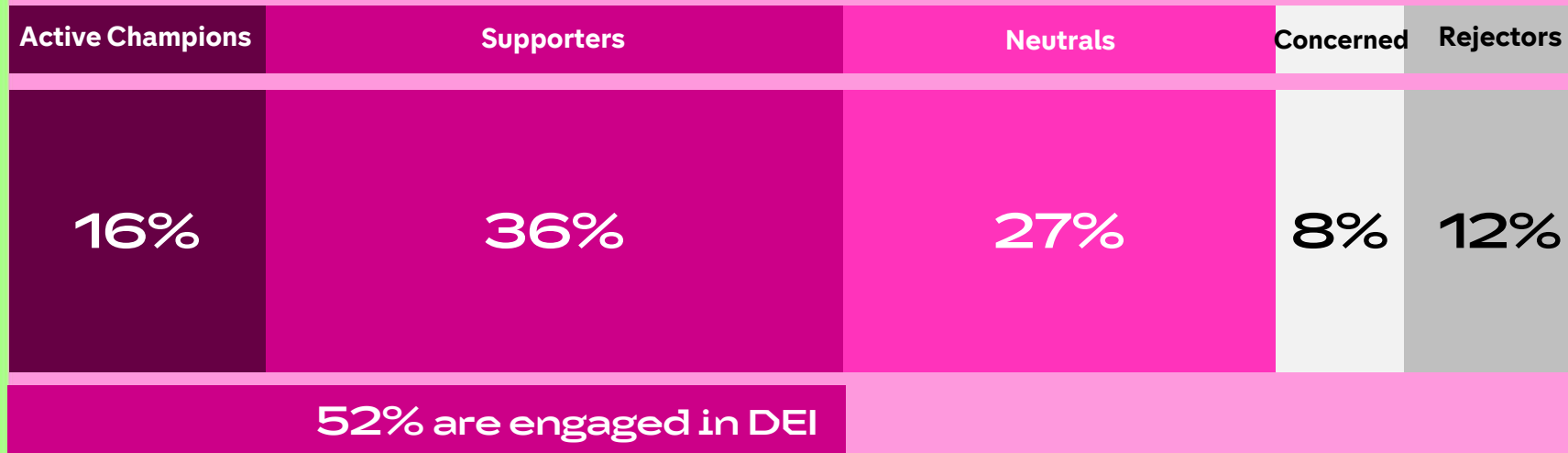
Over half are engaged in DEI progress

The UK are kinder, more tolerant and want to participate in change more than some headlines would have us believe.

In the UK, more than half of people actively champion or support DEI. Around a quarter sit neutrally, with potential to be brought on the journey without sparking anti-inclusion backlash. 8% have some concerns; they are not against DEI but question whether its principles are fair or effective. And 12% are self-proclaimed non-supporters.

Yet it is this minority that dominates headlines, creating a distorted picture of public opinion and fuelling fear of backlash. The political climate is driving awareness, and people are conscious of the challenges some groups face. The reality is clear: the vast majority either support or are neutral on DEI, offering a strong foundation for progress, influence, and change.

We asked UK adults to tell us where they sit when it comes to DEI (2025)¹⁰ ...



"Over the last two years the **political climate** has made me more aware of Diversity & Inclusion."
2025, 51% 2023¹¹

52%

"Over the last two years I've become **more aware of the challenges** that are faced by different groups in society in general"
2025 & 2023, 60% 2021

56%

DEI in advertising has become *more* important

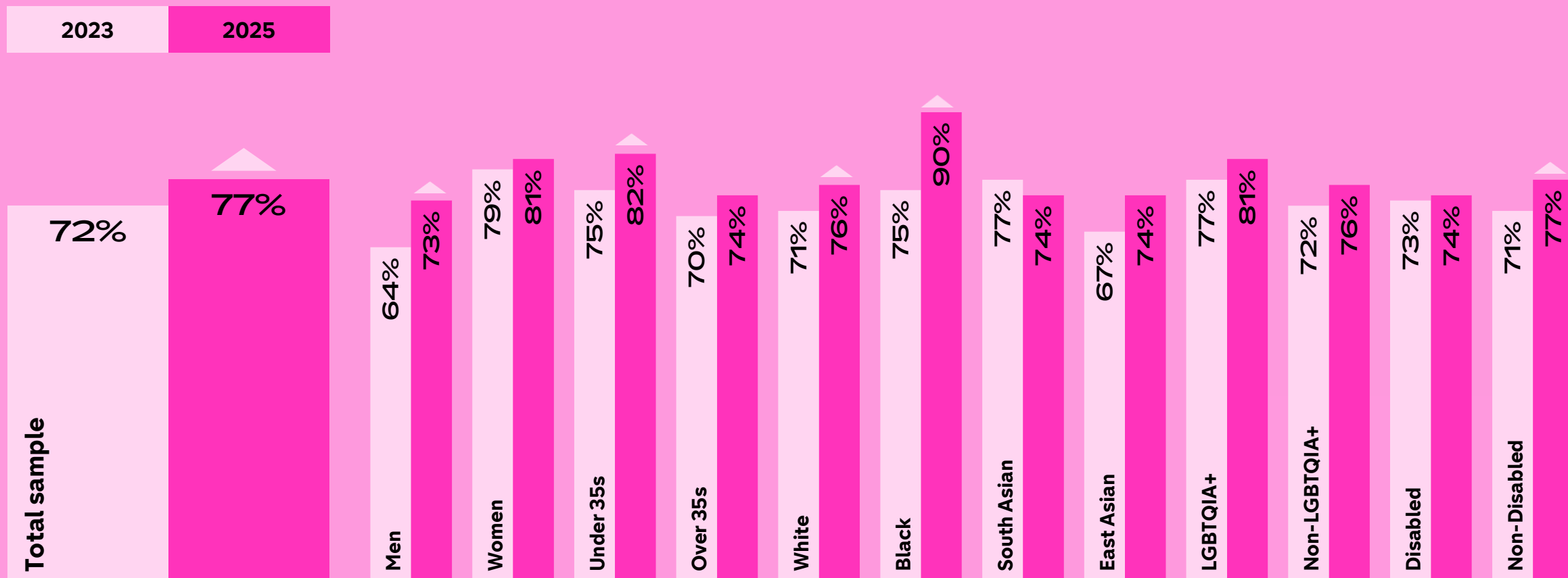
Since 2023, the perceived importance of DEI in advertising has grown overall, and across demographic groups.

Over three quarters of people in the UK believe DEI is important in advertising, reflecting a broad and growing demand across society. When we compare 2025 with 2023, we see lifts across most groups, reinforcing that audiences across the board expect brands to reflect inclusion in their campaigns.

The lifts are significant among men, under 35s, White people, Black people, and non-Disabled people. This growth highlights that DEI is not only a societal value but also a brand expectation. Advertising that embraces DEI isn't just responding to a passing trend, it is delivering against the growing perceived importance within the industry

% UK of adults that agree DEI important in advertising (2025)¹²

Significantly higher or lower vs. 2023 at 95% confidence



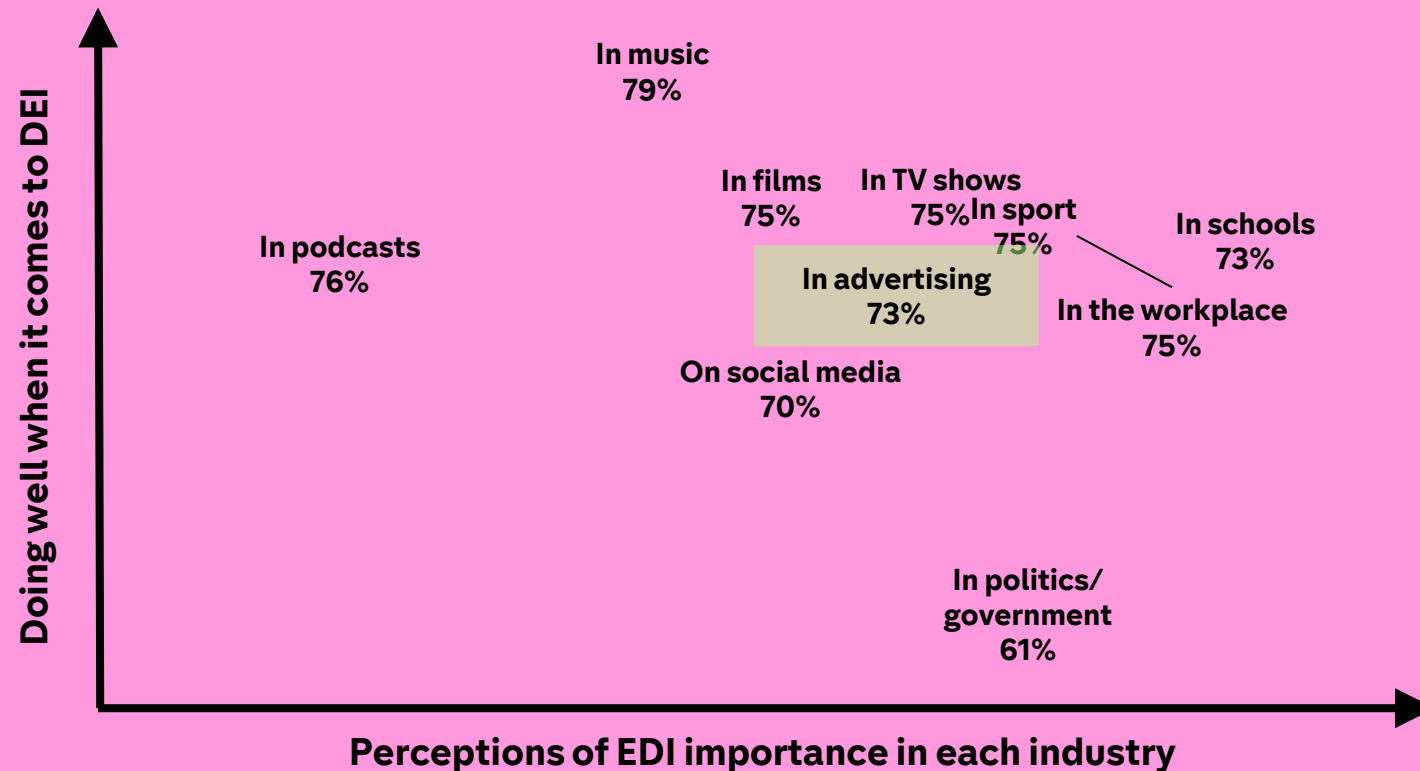
It's not *all* on ads, but it *is* on ads

Advertising sits within a broader ecosystem of necessary change; consumers expect advertisers to do their part.

Advertising plays a visible but balanced role in the UK's DEI landscape. Compared with other areas of culture and society, the advertising industry sits firmly in the middle, neither seen as leading the way nor falling behind. This positioning matters: advertising is one of the most public expressions of inclusion, and audiences hold it to account.

While institutions like politics and government are viewed as lagging, and music or TV are considered ahead, advertising occupies a pivotal space where expectations are high, and progress is being noticed. People recognise that brands cannot solve inequality alone, but they do expect the sector to contribute meaningfully. In short, advertising is central to change, it's not the whole story, but an essential part of it.

Importance vs. Progress for DEI (% shows progress)¹³



"Over the last two years D&I in advertising have become a must for UK advertisers: **it is no longer an option to ignore** this topic."
2025, 61% 2023¹⁴

60%

"Over the last 2 years I've **paid more attention** to how different groups in society are reflected in advertising."
2025, 51% 2023

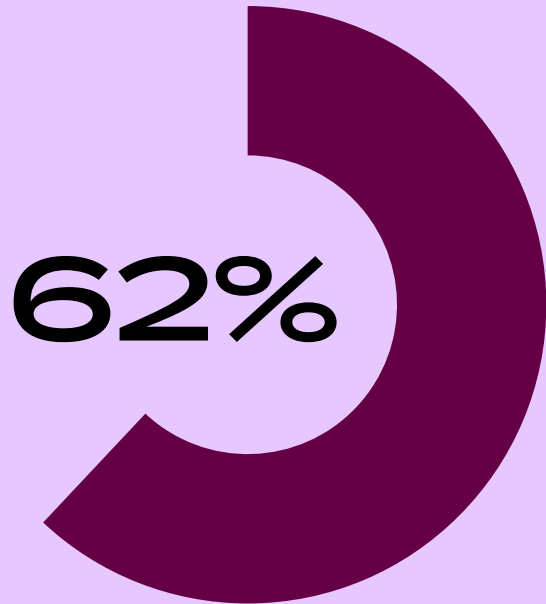
49%

People see advertising embracing inclusion

There have been some improvements in the way ads are being perceived, with many thinking ads feel more inclusive.

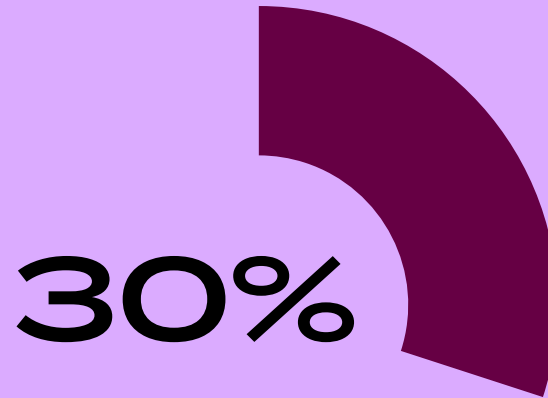
The public are noticing changes in how advertising approaches diversity and inclusion. People believe the industry is placing more emphasis on these issues, and that perception matters, it reflects a growing sense that brands are taking accountability. Around a third of people feel they have seen more people like themselves reflected, highlighting the personal impact of these shifts.

Whilst this is not a measure of how often certain groups *are* appearing on screen; it reflects how audiences *think* the industry is performing and what is standing out to them. Encouragingly, the general population point to several groups where progress feels most visible, suggesting advertising is starting to be recognised as a space where inclusivity is moving in the right direction.



have noticed brands put **more emphasis on inclusion and diversity** in their advertising

2025 & 2023 ¹⁵



think representation of **people like themselves** has increased in the last 2 years

2025, 27% 2023 ¹⁶

The general population think representation has improved for many minority groups, including¹⁷:

#1	Black people	52%
#2	Physically Disabled	50%
#3	Multi-ethnic people	47%
#4	Plus-sized	45%
#5	LGBTQIA+	44%

Rolling Back the Years:

Has representation in advertising improved?



Disabled representation is low and stagnant

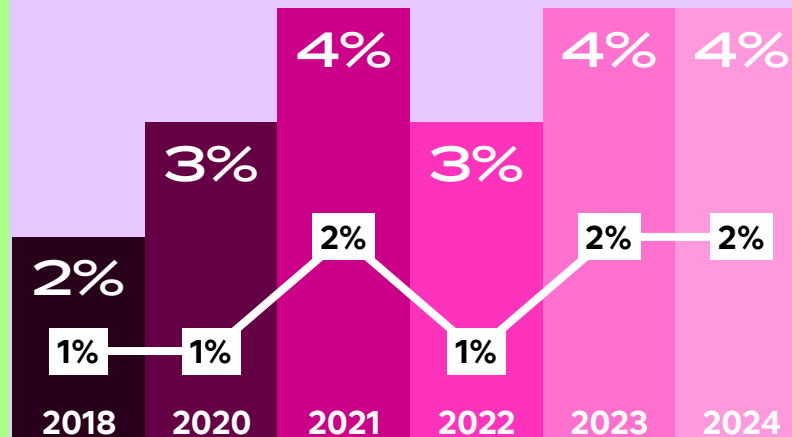
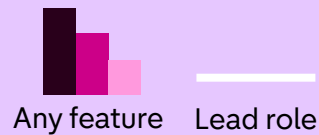
24%
of the adult
population¹⁸

Perceived improvements do not always match reality, we see this frequently with Disabled representation.

Disabled people have been underrepresented in advertising since 2018, with visibility not surpassing 4% of ads. While there has been some uplift in more “normalised” portrayals, brands rarely feature Disabled people in BAU product or service ads. Instead, they are far more likely to appear in emotive or serious ads, leaning into feelings of sadness or inspiration to raise awareness for a cause or charity.

This lack of integration means representation is not only limited in scale but also in tone, with less playful and light-hearted portrayals. Brands must also consider whether creatives themselves are accessible, ensuring all audiences can engage fully, whether it be detailed narration, integrated subtitles or closed captions, and at the very least, saying the brand’s name within the ad.

% of ads featuring Disabled people¹⁹



Despite an uplift in normalised representation, Disabled people are rarely used in BAU products in ads

27%

normalised representation vs 16% in 2023²⁰, but this group are also **27%** less likely to be in a product/service ad²¹

“Disabled individuals are still **rarely seen in everyday product ads**, and when they are, it’s often in a **tokenistic or ‘inspiration’ focused** context”
Male 16-24, Disabled Respondent²²

Disabled characters’ inclusion skews towards serious and emotive advertising

8x

more likely to be a serious ad vs ads without Disabled characters (24% vs 3%)²³

2.9x

more likely to be an emotive ad vs ads without Disabled characters (44% vs 15%)

Ads at large aren't inclusive by design

Representing Disabled people is one part of the picture, ensuring Disabled people can experience your ad is another.

Improving the visibility and portrayal of disabled people in advertising is vital, but representation alone is not enough. True inclusion means ensuring disabled audiences can actually access and experience creatives. Today, too few ads build in subtitles, audio description, or narration, leaving many excluded from the brand experience. Channel 4 Sales has now committed that, from spring 2026, all

ads running across its linear and streaming inventory will be required to include closed captions, a practical industry step towards making ad viewing genuinely inclusive. By integrating accessibility from the outset, brands widen their audience and show they value *all* consumers.

Only
3%

of ads had subtitles built into the creative

2024²⁴

12%

of ads didn't audibly say the brand name

2024

Only
1%

of ads had detailed audio description built into the creative

2024

35%

of ads included detailed narration

2024

2024 'Inclusive by Design' Diversity in Advertising Award winner²⁵

Currys' ad is a great example of placing inclusivity at the heart of its creative at every level. Seamlessly fitting into their 'Beyond Techspectation' brand campaign, the ad features an audio-describer and BSL interpreter within the narrative, shows different disabled customers and is served with a healthy dose of light-hearted humour. This ad was grounded in lived-experience, informed by insight at every step of the journey.



LGBTQIA+ people are rarely seen in ads

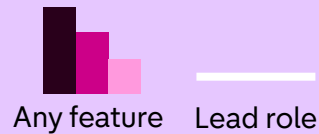
3%
of the
population²⁶

Our latest audit shows only 2% of ads feature this group, representation often lacks intersectional exploration.

Representation of LGBTQIA+ people in advertising has remained consistently low and largely stagnant for the past six years, with a small decline in our most recent audit. Year after year, when representation does occur, it is limited and shaped by stereotypical views of how people within this group look and act. LGBTQIA+ people

are significantly more likely to be shown in the context of romantic relationships, which has become the industry's go-to cue to ensure their inclusion can be recognised, yet they are far less likely to be portrayed within families

% of ads featuring LGBTQIA+ people²⁷



A lack of intersectional representation continues for LGBTQIA+ people

2x

more likely to be assumed 19-29 years old vs. the avg. character (42% vs 21%)²⁸

33%

more likely to be white vs. the avg. character (77% vs 58%)²⁹

Whilst portrayal tends to be joyful, LGBTQIA+ people are never seen in serious roles

36%

more likely to be portrayed as happy (84% vs 62% non-LGBTQIA+ characters)³⁰

0%

portrayal in a serious role vs 11% for the avg. character

How do ads make LGBTQIA+ inclusion visible

We've identified two core ways that advertisers have represented LGBTQIA+ people in ways that make their inclusion explicitly clear to audiences:

Romantic Relationships

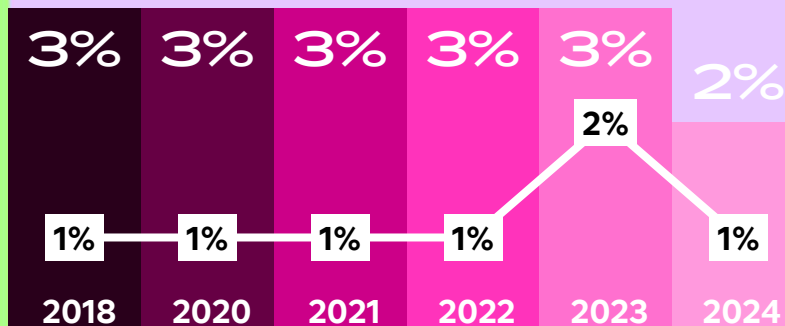
3.3x

more likely to be portrayed within a romantic relationship vs avg. character (81% vs 19%)³¹

Celebrities and Well-Known Figures

67%

more likely to be well-known figures or celebrity vs avg. character (10% vs 6%)³²



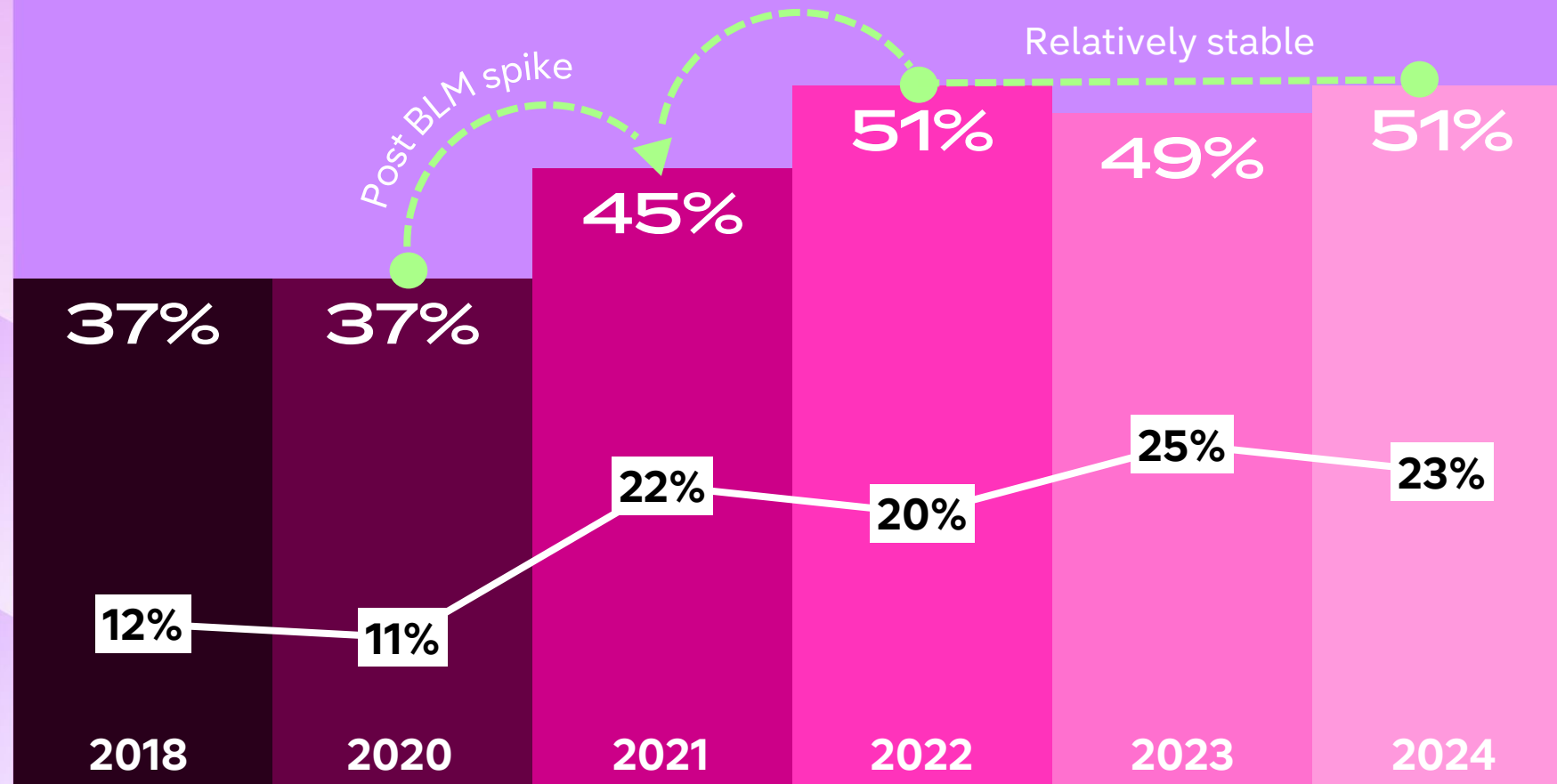
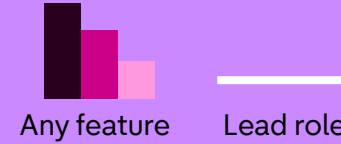
The industry has sustained commitment to representing Black people

After a clear spike in representation of Black people following the Black Lives Matter movement in 2020, the ad industry has largely sustained its commitment to ensuring Black people are seen on screen and in lead roles. Proportionally, Black people remain the highest represented group relative to their population size.

More ads feature Black people

4%
of the
population³²

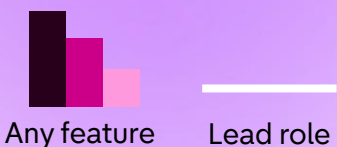
% of ads featuring Black people³³



Ethnic minorities have strong levels of representation overall

South Asian, East Asian, and mixed ethnicity groups continue to hold strong representation in UK advertising relative to population size. South Asian presence has grown, East Asian representation shows gradual movement after past declines, and mixed ethnicity visibility remains consistent, reflecting the broader stability of ethnic minority representation overall.

Graphs show % of ads featuring South Asian, East Asian and Mixed ethnicity people³⁴



South Asian

8% of the population³⁵

In 2024, South Asian representation spiked overall, with growth in lead roles across the past two years, for the first time exceeding overall levels of representation seen in 2020.

East Asian

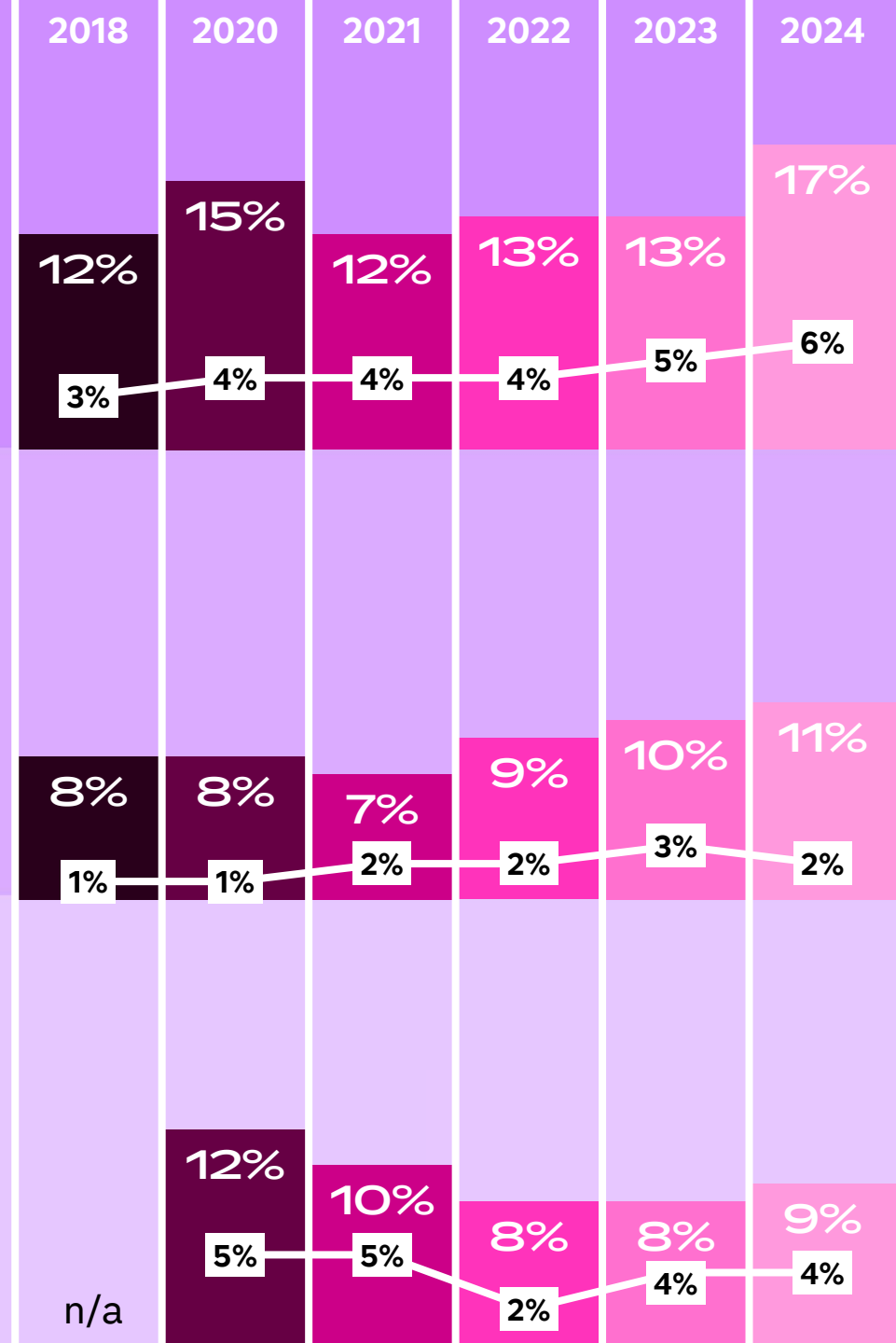
1% of the population

East Asian representation in advertising has shown slow but steady growth since 2022. However, this increase has not translated into significant gains in lead roles, where visibility for East Asians remains comparatively limited.

Mixed ethnicity

3% of the population

Mixed ethnicity representation in advertising has remained relatively steady, reflecting consistent visibility across recent years. Yet, representation in lead roles remains limited compared to other ethnic minority groups.



Quantity doesn't always mean quality

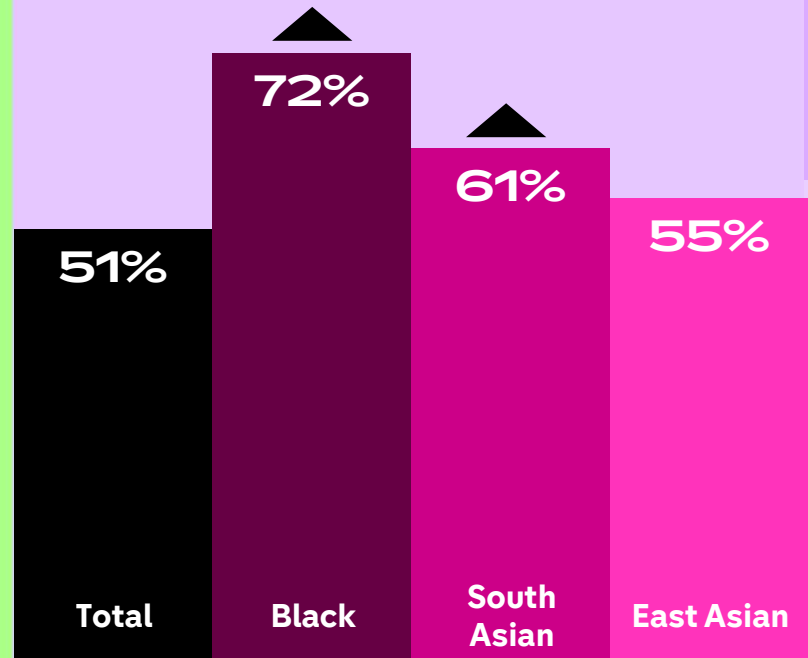
Whilst people from ethnic minority backgrounds show up on screen, *how they show up* drives a desire for more.

Visibility of ethnic minorities in advertising has grown, but not all representation feels inclusive. Being on screen is only the first step, what truly matters is prominence, portrayal, and the roles characters occupy. Too often, minority groups are shown in stereotypical settings, or included without meaningful dialogue, which limits impact. Short screen time further weakens efforts to

normalise inclusion, leaving representation feeling surface-level. True progress is not just about numbers but about quality and authenticity. Brands should ask: are we dismantling stereotypes, normalising diversity, and giving characters enough space to feel real and valued? Only then does representation achieve genuine inclusion.

"Companies should do more to represent people like me in TV adverts"

2025³⁶



South Asian characters more likely to be shown in stereotypical jobs:

4-5x **2.6x**

more likely to be a **shop assistant** or **health worker** vs avg. character³⁷

more likely to be an **officer worker** vs. the avg. character

East Asian Characters rarely have speaking roles:

8%

of East Asian characters **audibly speak** within ads³⁸

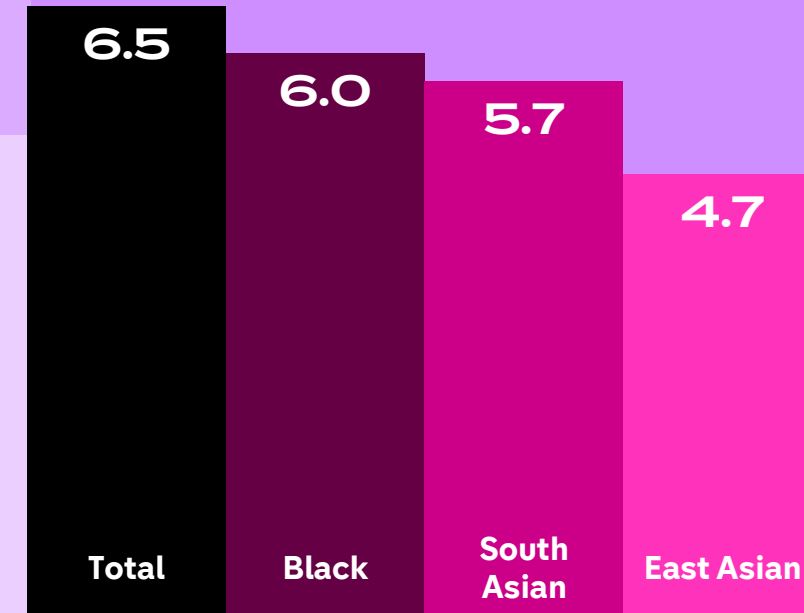
50%

of the time they are speaking, it's **not in a British accent**

Whilst ethnic minority groups are on screen, it's more fleeting

2024³⁹

Avg. screen time (s)



We have work to do

Despite perceived improvements, our audit data supports the public's opinion that we still have more work to do.

Over the past six years, we've seen progress in some areas of representation, alongside areas where momentum has slowed. Reflecting on this brings accountability but also creates space to grow. The industry has an opportune chance to raise the bar, tell richer stories, and connect with audiences in authentic, lasting ways.

Audiences expect advertising to reflect society more fully. From six years of reflection, we've identified three themes shaping how representation shows up on screen and where focus is needed. The following sections share inspiration and tools to embed meaningful, sustainable inclusion.



50%

"There's more that needs to be done to make advertising more representative of the different groups in the UK today"

2025 ⁴⁰



73%

"People think it would be easy for TV advertisers to include people from different groups in society in TV adverts."

2025 ⁴¹

The Power of Storytelling:



An evolution of montage ads

Montage ads are increasingly common. They can increase representation but risk perceived tokenistic inclusion. Done well they can be powerful vehicles for authentic, inclusive storytelling.

Walking the Line:



Creating ads that are both aspirational and relatable

Advertising centres on aspiration. However, the balance between being aspirational and being relatable is essential for brands seeking meaningful audience connection today.

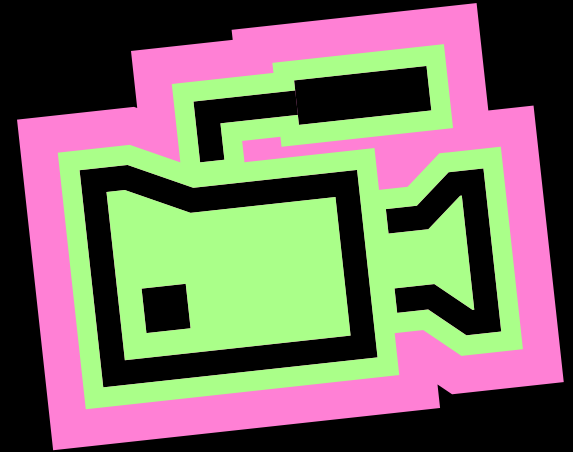
Missing Persons:



The people we're still not seeing in ads

Some groups in society remain entirely absent from our screens. To create true inclusion, we must tell their stories; let's see the unseen and hear the untold.

The Power of Storytelling: An Evolution of Montage Ads



There are two
core ad formats
that we see in
our audits

Single-narrative

A single narrative ad tells one continuous story, usually following a character or a few characters through a single storyline from beginning to end.



Montage

A montage ad shows a collection of different scenes or moments, cut together without one continuous storyline, often spanning different places, times, or characters.



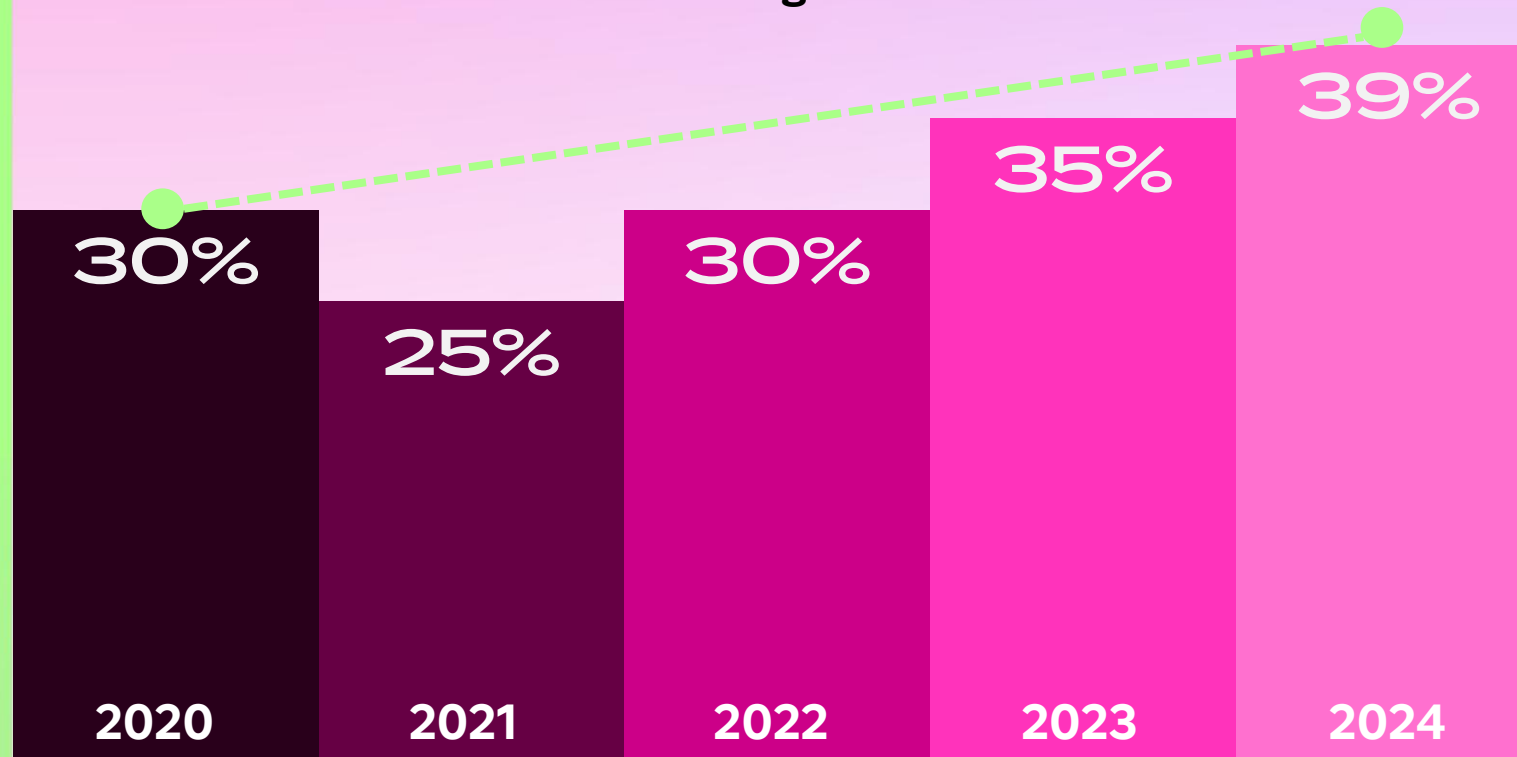
The most montage ads ever

There has been a noticeable rise in the use of montage ads, this comes with pros and cons.

Montage ads are becoming more common, reflecting a media landscape that values flexibility, cutdowns, and the ability to showcase many people within a single ad. Montage ads allow multiple perspectives to be included at once, but this breadth can also limit depth.

With more competition for screen time, portrayals often feel fleeting, reducing the opportunity for meaningful storytelling. Minority groups are particularly likely to appear in montages, which risks their representation being delivered in shorter, less developed moments rather than fuller narratives.

% of montage ads⁴²



46%

of ads featuring minority characters are montages

vs 39% of ads overall, 2024⁴³

4.2

lead/minor characters on average in montages vs 2.2 in single-narrative ads

2024⁴⁴

4.2s

on screen on avg. for lead/minor characters in montage vs 9.2s for single-narrative ads

2024⁴⁵

The 'Montage Effect'

Representation in montage ads can come at a cost of leaving minority groups feeling their inclusion is tokenistic.

In our early qualitative work, we coined the phrase “the montage effect” to describe when minority groups saw straight through montage ads using their presence as a tick-box exercise rather than meaningful inclusion. Almost all of the tokenistic examples coded in our latest audit appeared in montage ads

Unsurprisingly, many say this leaves them feeling tokenised. People in the UK believe representation of all groups remains vital. Sometimes that means showing minority people in their own right; other times it's about celebrating difference together, with connection at the heart of inclusion.

87%

of ads coded with tokenistic inclusion occurred were montage ads ⁴⁶

2024

Common denominators included:

Only a single minority character featured

Minimal screentime for minority characters

Minority characters not shown clearly
(turned away, obscured, or shown in profile)

1 in 2

ethnic minority people say they only ever see people from minority groups portrayed in a tokenistic way in TV adverts (48%) ⁴⁷

2025

Given almost half (47%) of ads featuring ethnic minority were montages in 2024 ⁴⁷, it's unsurprising that they feel inclusion is largely tokenistic.

It's vital we take note and explore solutions, from more inclusive storytelling in montages, to investing in deeper single-narrative stories.

53%

agree it's important to them that TV adverts represent all groups within British society ⁴⁸

2025

Audiences want Britain's diversity truly reflected. Intentional montages can celebrate difference as a strength that brings us together, reminding us all how beautifully diverse our Kingdom is.

Tap into the inclusive power of montages

Virgin Atlantic - See the world differently, 2025 ⁵⁰

Virgin Atlantic's 2025 See the World Differently campaign shows how montages can be inclusive when every detail is intentional. Narrated with Maya Angelou's words, it urges us to "be a rainbow in somebody else's cloud", celebrating kindness, individuality, and connection across difference. Scenes of crew and

customers highlight small, human gestures that feel authentic rather than tokenistic. This campaign demonstrates that, when thoughtfully executed, montages become a powerful vehicle for meaningful, authentic inclusion.



Stories that count, formats that fit



Quality makes it count

Montages can be a powerful format for increasing the breadth of representation but can risk quality of portrayal and prominence. Ensure characters aren't fleeting or tokenistic by giving them depth and purpose within the ad. Quality representation comes from thoughtfulness, not box ticking, creating portrayals that audiences recognise as authentic and meaningful.



Steer the narrative

Montages are most powerful when they do more than place diverse characters side by side. Used with intention, they can steer a narrative that shows connectedness across difference, making inclusion feel purposeful rather than tokenistic. Celebrate individuality while revealing the shared human truths that connect us all.



TV tells it best

Television remains advertising's most powerful storytelling medium. The combination of sight, sound, scale and attention allows nuanced portrayals to breathe. Utilise platforms that ensure your stories land with clarity and impact, capturing the richness of peoples lived experiences in ways shorter, fragmented formats may not achieve.

Walking the Line:

Creating ads that are both aspirational and relatable



Show real and redefine 'ideal'

Advertising needs to strike the balance between aspirational images that inspire and relatable stories that reflect real lives.

Advertising has often leaned on aspiration, with polished lifestyles, idealised bodies and the suggestion of perfection that feels out of reach. While aspiration can inspire, it risks alienating audiences if it fails to reflect real lives.

Representation that is grounded in relatability can also be aspirational, with audiences valuing emotional strength, humour, care and new definitions of success that go beyond wealth or status. This section explores three areas where

the balance needs attention: beauty standards, family and household dynamics, and class and social grade.

By blending relatability with inspiration, advertising can reflect and elevate everyday lives, offering stories that feel true while still showing what is possible.



1 in 10

say ads feature 'too little' of people like them

29% 2025, 30% 2023 ⁵¹

2 in 5

feel anxious and shameful about their appearance

Mirror on Body Diversity, 2022 ⁵²

Only

17%

of people strongly agreed they aspire to the occupations at the top of socio-economic group (SEG) lists

Mirror on Class & Social Grade, 2024 ⁵³

Beauty Standards: Body Diversity

Advertising continues to project a narrow view of body diversity, sidelining larger body types and reinforcing body image ideals.

Body diversity in TV advertising remains limited. Bodies defined as 'plus-size' are still too often stereotyped, shown through narrow lenses that reinforce outdated tropes rather than celebrating people in all their forms. We often see characters defined as plus sized as older or working-class, as well as skewing toward men and having a comedic tone.

This reduces the breadth of stories told, prevents audiences from seeing themselves in serious roles and sets different standards for men and women. Without authentic, varied portrayals of body diversity, advertising risks amplifying shame and exclusion, rather than inspiring confidence, relatability and connection.

Body diversity continues to lack in TV advertising⁵⁴

91% VS 5%

of characters
Slim/midsize
2024

of characters
Plus size
2024, 13% 2023

Significantly more likely to be...

Ages
50+

Men

Working
-class

Funny



Beauty Standards: Colourism & Ageism

Advertising consistently projects images of lighter toned characters and youthful representations of beauty, holding society to harmful, outdated and exclusionary beauty standards.

Advertising can limit the definition of beauty, by showing mainly lighter skin tones and youth while sidelining darker skin and older age groups. Using the Fitzpatrick scale, we see colourism seep onto screens; darker skin tones appear far less often, and when they do, they are more likely to be men or associated with assumed working-class characters. Ageism is also prevalent, with older characters

significantly less likely to appear in cosmetic ads. Women in particular are more likely to be shown as younger than men. Though campaigns by Loewe and Selfridges highlight the strength of exploring beauty across ages and cultures, exemplifying what we need to bring to TV. Brands should challenge outdated beauty standards and encourage beauty beyond skin-deep to be aspirational.

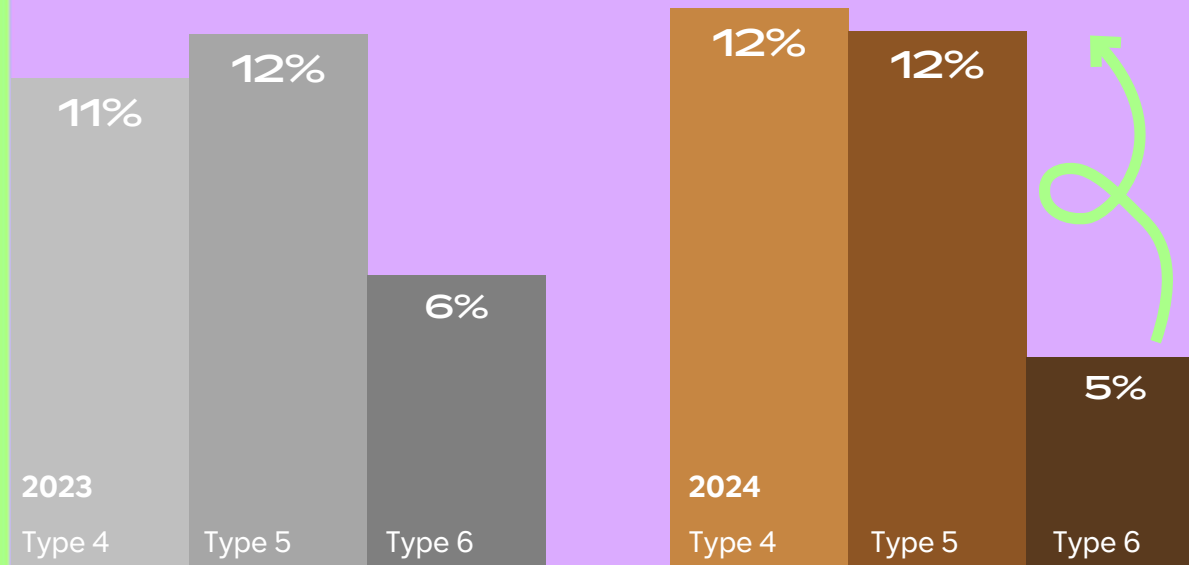
Fitzpatrick skin tone scale - % of characters⁵⁵

The Fitzpatrick scale is a system used to classify human skin tones, ranging from very light to very dark. Our audit reveals that the representation of darker skin tone remains low year-on-year.

Type 6 more likely to be

Men

Working-class



Ageism is still prevalent, especially for women on screen

39%

of female characters are **under 30** vs **29%** of male characters 2024⁵⁶

54%

less likely to be a cosmetic/personal care ad if it features a 50+ character (6% vs 13%) 2024⁵⁷

We're beginning to see brands redefining aspirational beauty not just physically, but by exploring human stories across ages, cultures and appearances that reshape beauty standards beyond skin-deep.



Luxury fashion brand Loewe leant into the beauty and elegance of aging with the late Dame Maggie Smith in 2023⁵⁸



In 2025 Selfridges and Nowness collaborated with four filmmakers to celebrate the beauty of growing older, linking human truths with intersectional experiences⁵⁹

Family & Household Dynamics: Gender Roles

Home and family life has long been a vehicle for aspirational advertising, historically visualising rigid gender norms. Today ads look equal on the surface but still fall back on narrow roles and predictable tropes.

Almost 1 in 4 of all characters in ads appear within a family setting, making it one of the most visible spaces for representation, yet still one of the most constrained. Men and women appear in equal measure, but the roles they play are limited.

Men are more often linked with fun and leisure, while women remain tied to domestic maintenance. Non-traditional families, such as step, adoptive and LGBTQIA+ households, are almost entirely absent, leaving audiences with a narrow view of family life.

The Family History

23%

of all characters in ads appear within the family setting⁶⁰ and the portrayal of the family home has long been a vehicle for advertising to showcase products to aspire to, especially when depicted as extensions to the household itself.



Still, ads from 2024 lean into idealised images of the family⁶¹. Characters in familial roles are...

42%

more likely to be in a suburban setting vs avg. character

13%

more likely to be non-working-class vs avg. character

There remains an **absence of blended, adoptive and LGBTQIA+ families**, and limited representation of single parent homes.

Family Gender Dynamics

Positively, we found that men and women are equally likely to appear in familial roles.⁶²

24%

Men in familial roles
2024

vs

22%

Women in familial roles
2024



Despite some advances to move beyond the stereotypical image of the nuclear family, gender norms do persist.⁶³



Male familial roles are more likely to appear in:

- **brand-building** ads
- showcasing **fun** experiences e.g. holiday ads



Female familial roles are more likely to focus on:

- **home maintenance** e.g. laundry



Family & Household Dynamics: Ethnicity

Family through the lens of ethnicity reveals a skew towards specific family make-ups

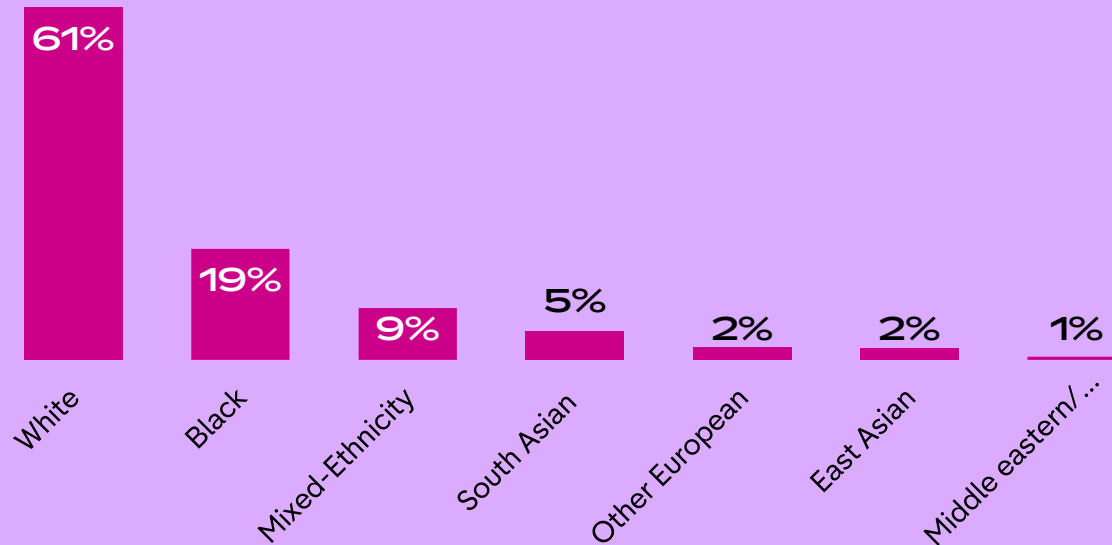
Looking at family through the lens of ethnicity, White characters are far more likely to be shown in family settings than any other group. Middle Eastern, East Asian, other European and South Asian familial characters have far less presence. Ethnically diverse families often appear through the use of multi-ethnic families, with young mixed-ethnicity children. This is a reoccurring trend which came to light

in the first Mirror On The Industry project and continues today. Brands should consider how to expand representation of families across different ethnic groups. Offering audiences a window into differing family lives, as well as reflecting back families across the UK, rich in both cultural difference and human synergies.



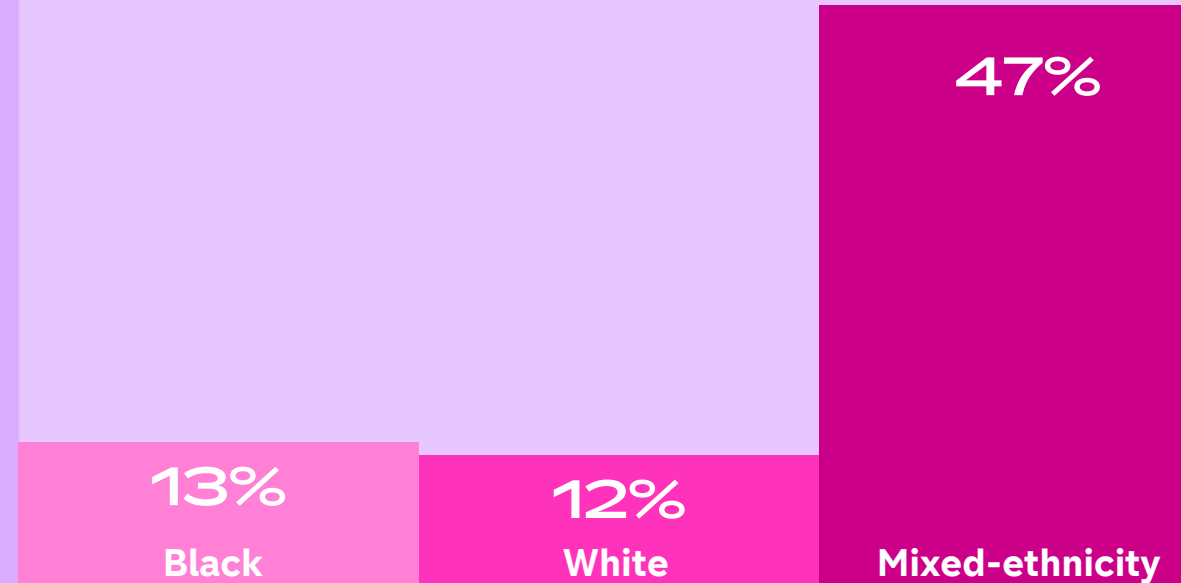
Families are **predominantly represented by White characters**, followed by Black and multi-ethnic characters

Ethnicity of characters portrayed as part of a family in 2024⁶⁴ ...



Multi-ethnic families with young multi-ethnic children continue to be **the go-to** for family representation⁶⁵

% of total characters aged 18 and under



Class and Social Grade

Working-class characters deserve aspirational portrayals too, not limited to outdated stereotypes of struggle or exclusion.

Advertising, especially in the luxury space, has always leaned into aspiration, aiming to portray desirability through its characters and settings. But in doing so, it often defaults to non-working-class portrayals, while working-class characters appear more in functional or discounted product ads. This imbalance matters: half of the UK identify as working class, and when ads feel unrelatable, they alienate audiences.

Working-class people shouldn't only be cast through tropes. When brands embrace positive portrayals of working-class people, they don't just reflect reality more accurately, they also unlock stronger emotional connection with a much broader audience.

50%

of people consider themselves working class
Mirror on Class and Social Grade, 2023⁶⁶

60%

of characters in ads are assumed to be non-working class
2024⁶⁷

12%

of characters in ads are assumed to be working class with the remainder 'impossible to tell'
2024



High end ads are

18%

more likely to represent assumed non-working-class characters vs. avg. character
2024⁶⁸

Working class characters

38%

less likely to be shown as **confident** vs avg. character
2024⁶⁹

Working class characters

17%

less likely to be shown as happy vs avg. character
2024

Screwfix created a joyful TV ad, featuring three trades people working hard (and playing hard). The three characters dance around the renovation, working together on the build. This is a great example of making the ordinary aspirational through joyful emotion.



Challenge norms, reshape aspiration



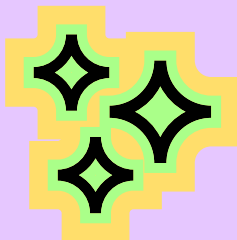
Step outside of the box

Brands must break free from stereotypes and create new cultural norms. Outdated and stereotypical portrayals limit creativity and connection. By flipping long-standing tropes, advertisers broaden who feels included, and in turn will build deeper relationships with audiences often overlooked and underserved.



Don't underestimate relatability

Relatability strengthens both the quality and quantity of representation. Humour, resilience, care and everyday joy connect with audiences on a deeply human level. This is not the opposite of aspiration but a redefinition of it, showing that authenticity and inclusion motivates just as much as wealth, exclusivity or luxury.



Aspiration is not one-dimensional

Aspirational advertising shapes how people see themselves and others. By challenging narrow norms around beauty, family and class, brands open space for identities to be celebrated and valued. Aspiration can mean joy, confidence and belonging. Offering richer, more inclusive visions of success deepens audiences understanding of each other.

Missing Persons:

The people we're still not seeing in ads



Present in life, missing in ads

Brands have the power to bring the rarely seen into view, connecting with consumers, and connecting consumers with each other.

Too often in society, certain groups are pushed to the margins or deprioritised altogether. We see this in the way older people are sidelined once they reach a certain age, or how neurodivergent people, those with mental health conditions, or those with neurological differences are misunderstood, stigmatised or ignored. Advertising reflects these same cultural blind spots.

Across our audit, these groups are practically absent in lead roles, where meaningful stories of identity and experience can be told, celebrated and normalised.

Pregnant people remain scarcely visible, while LGBTQIA+ communities, particularly transgender and non-binary people, rarely see their realities represented.

By neglecting these groups, advertising mirrors the exclusion they face in everyday life rather than challenging it. And importantly, these are not small populations; they represent significant parts of society and potential consumers.

Failing to include them not only undermines inclusion but risks missing meaningful connections with audiences who are eager to be seen and connect with your brand.

1 in 2

say TV adverts are still falling short of representing certain groups

49% 2025, 50% 2023 ⁷⁰

2 in 3

say brands have a responsibility to represent all people

62% 2025, 67% 2023 ⁷¹

1 in 2

say there should be more people from minority groups playing lead or main characters in TV adverts

52% 2025 & 2023 ⁷²



Disabled People

Advertising can challenge stigmas by giving neurodivergent, neurological conditions and mental health experiences authentic, visible roles that show life in its full humanity.

Despite accounting for an estimated 15 to 20 percent of people, neurodivergent, people and people with neurological or mental health conditions appear in just 0.3 percent of ads in lead roles. Representation is still concentrated in charity and health contexts. Visibility should not centre on pity or frame the everyday as an inspirational achievement for Disabled people. It is about authenticity, open

conversation, human complexity, normalcy and ultimately, shared human experiences. Campaigns such as Lloyds Bank's "Get The Inside Out" and Vanish's "Me, My Autism & I" show how honest storytelling can spark dialogue and shift perceptions.

0.3%

of ads feature neurodivergent people, or people with neurological or mental health conditions in a lead role
2024⁷³

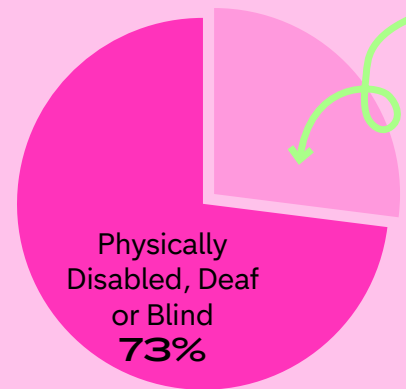
15-20%

of the population are neurodivergent, have neurological and/or have mental health conditions
Estimation from NHS⁷⁴

9 in 10

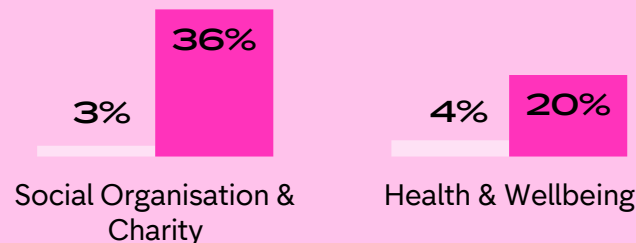
16-24s say that most brands can do more to raise awareness, shift perceptions and increase understanding of neurodiversity
Mirror on Neurodiversity, 2023⁷⁵

Proportion of representation amongst Disabled characters⁷⁶



Neurodivergent people, or people with neurological or mental health conditions
27%

■ Ads without Disabled characters
■ Ads with Disabled characters



Lloyds Bank, 2017 Diversity In Advertising Award Winner⁷⁷



"Get The Inside Out" showed everyday people, alongside well-known figures, normalising conversations about mental health, sparking dialogue across ages and backgrounds.

Vanish, 2022 Diversity In Advertising Award Winner⁷⁸



"Me, My Autism & I" gave a lens into a young girl's lived experience of autism, breaking myths and sparking wider conversation about autism in girls.

People Aged 70+

Older people shop, laugh and live too, yet advertising tends to paint a picture centred around poor health and low confidence.

Older people remain extremely underrepresented in advertising. Too often, characters aged 70+ are shown only in wellbeing or charity contexts, which limits how their lives are portrayed. We rarely see older people promoting everyday products and services. This group are also significantly less likely to be from an ethnic minority background.

By narrowing older people's presence in this way, advertising overlooks the opportunity to engage with them as consumers and shine light on the richness, relevance and relatability of later life. The ILC predicts that, by 2040, 63p spent in every pound will come from older audiences.⁷⁹ Not representing them is a risky choice for brands in an aging population.

2%

of ads feature people assumed to be aged 70+ in a lead role
2024, 2% avg. 2021-2024⁸⁰

14%

of the population is 70+
Census, 2021⁸¹

40%

of people feel this group is underrepresented
2025⁸²

On the rare occasion people assumed to be 70+ do show up on screen, their **portrayal is significantly limited** compared to the avg. character⁸³

5.9x

less likely to be ethnic minority
2024

34%

less likely to be confident
2024

2x

more likely to be unwell
2024

Less likely to feature in an ad:

Selling a product or service

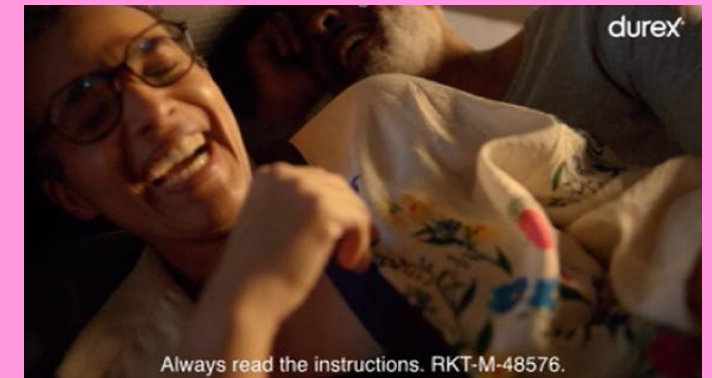
More likely to feature in an ad:

Highlighting an issue and/or cause

Health & wellbeing related

Normalised Example: Durex

Spliced within a montage of different body types, ethnicities and sexual orientations, Durex cut to an older couple enjoying their sex life just as much as anyone else in the ad. Stripping back one of the many misconceptions we have about aging.



Pregnant People

Pregnancy is routinely sidelined in ads, treated as anomaly rather than an incredibly common and normal experience.

Historically, pregnant women have been hidden from public view, and today, with headlines dominated by declining birth and fertility rates in the UK⁸⁴, the conversation and celebration around pregnancy feels even more muted. Whilst popular culture and some brands are pushing back, TV advertising reflects this societal discomfort, pushing pregnancy to the margins as though it were an anomaly.

It's no surprise that almost a third of parents feel pregnancy is underrepresented. This group could benefit from more normalised representation; pregnant people work, drive, eat - just like the rest of us, so let's show it within advertising.

0.1%

of ads feature pregnant people in a lead role

2024, 0.3% avg. 2021-2024⁸⁵

Cultural advances vs outdated tensions

Brands are beginning to push boundaries in representing pregnancy, but barriers remain. When a Times Square billboard of pregnant author Molly Baz was pulled for "unacceptable content"⁸⁸, it exposed the stigma still attached to pregnant bodies. Advertising must do more to normalise pregnancy, moving beyond shock towards normalisation.

Normalised Example: Hotels.com

A great example of normalised representation, reflecting a pregnant woman in and amongst the daily hustle and bustle, booking her 'baby-moon' holiday



594,677

births in England in Wales in 2024 alone

ONS, 2025⁸⁶

32%

of parents feel pregnancy is underrepresented

2025⁸⁷



Essential Example: Vodafone

A raw representation of pregnancy in all it's pain and beauty. The pregnancy was made essential to the ad's storyline.



Transgender and Non-Binary People

Normalising transgender and non-binary inclusion requires visibility, storytelling and ordinary depictions.

Despite 0% of ads featuring transgender or non-binary identities, these groups exist across society and continue to face disproportionate levels of discrimination. In a climate where their rights are repeatedly debated, visibility is more than representation, it's support. Because gender identity is not always visually obvious, authentic storytelling is as vital as normalisation.

Our 'Mirror On Transgender People' report highlights the power of showing trans people as "boring" and ordinary, rather than sensationalised. Brands can help shift culture by embedding transgender and non-binary lives naturally in campaigns, reducing stigma, challenging harmful narratives, and creating space for acceptance to grow.

0%

of ads feature transgender or non-binary gender identities in a lead role
2024⁸⁹

1 in 2

LGBTQIA+ people say they hide parts of their identity to be accepted in society 2025⁹²

"It's really important that brands recognise the power that they have just through visibility."

Professional Council Consultant, Mirror on Transgender People 2024⁹³

"We're not a monolith and we're far more diverse than the representation we get. We are ordinary, we have entire lives outside of the fact of our transness."

Community Council Respondent, Mirror On Transgender People 2024

0.5%

of the population identifies as non-cis gender
Census, 2021⁹⁰

Only 1 in 10

transgender people feel brands currently support the trans community
Mirror on Transgender People, 2024⁹¹

E45, 2023 Diversity In Advertising Award Winner⁹⁴



"This Is Me45" highlighted skin changes and lived experiences of trans (and gender-diverse) people, using empathetic storytelling to make their skin-care needs visible.

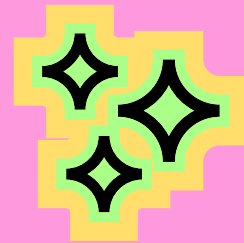
It addresses a specific, underrepresented aspect of trans lives (skin changes) with clinical relevance and dignity, expanding visibility beyond token appearances.

**In ads.
In sight.
In minds.**



Don't think small

These audiences are vast and full of potential: over 16 million disabled people in the UK, 9 million over 70, and every one of us is shaped by the experience of pregnancy. Representing them opens doors to enormous potential customer base, unlocking greater spend power, as well as cultural influence, and lasting loyalty.



Life doesn't stop

Being older, disabled, pregnant or transgender shouldn't mean that those people fade from view. They continue to thrive; working, shopping, laughing, celebrating, and loving. Advertising can reflect this vibrancy, moving past stereotypes to showcase lives that are rich, ongoing, and deeply relatable. Visibility at every stage celebrates relevance, joy, and belonging.

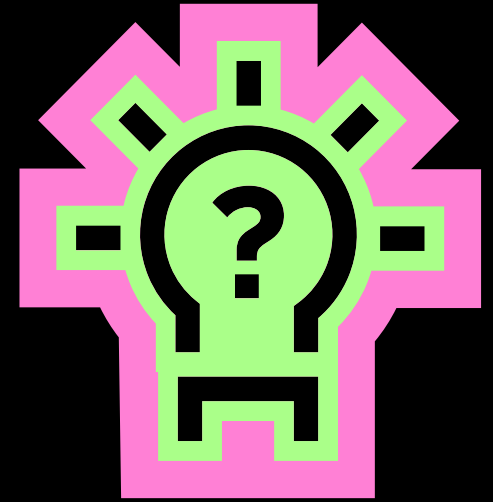


Normalise the nation

When inclusion is normalised, diverse identities move past being topics of debate and become accepted as valuable members of our society. When authentic stories are embedded, we get closer to a future where inclusion isn't just welcomed, it's expected. True progress isn't about spotlighting a select few, it's about ensuring every identity is naturally present.

Final Reflections:

The why, the how and the where?



We care, but why should you?

Care for social change, because your campaigns can do more than sell, they can rewrite the stories we tell about ourselves and each other.

Advertising is more than a platform for products; it is a cultural force that shapes how we see one another. It is both a reflection of ourselves and a window into the lives of others. At a time when empathy and understanding matter more than ever, audiences believe advertising can bridge divides, spark connection and build greater understanding between communities.

This creates both an opportunity and a responsibility for brands: to tell stories that reflect all of society and challenge the

stereotypes that hold us back. Audiences themselves expect this, with two in five agreeing that a campaign has made them rethink their own beliefs, proof that advertising can shift perspectives, dismantle outdated portrayals and inspire empathy.

By embracing this role, advertising can spark greater trust, connection and inclusivity, while showing consumers that brands are not just selling, but helping to create a more forward-thinking culture.



65%

agree good advertising can help different communities understand each other better

2025, 65% 2023⁹⁵

63%

agree advertising has the power to break down stereotypes

2025, 64% 2023

40%

Say they have personally come across advertising that has made them reevaluate their own beliefs x

2025, 41% 2023

Good for society, great for your brand

Caring for inclusion means caring for your brand and business.

Inclusive campaigns deliver brand results⁹⁶

Channel 4 and Sonder's campaign effectiveness tool, Play-Back, has measured the impact of hundreds of Channel 4 partnership campaigns. Within that mix is our Diversity in Advertising (DIA) award winning campaigns. Compared to our total norms base, our DIA campaigns blow

effectiveness out of the water across ad and brand metrics. The high execution of inclusive stories make the brand more recognisable, with huge uplifts in brand consideration and affinity.

41%

ad recognition
vs the Pl4y-Back campaign effectiveness norm of **33%**

41%

brand recall
vs the Pl4y-Back campaign effectiveness norm of **26%**

+8.3

uplift in consideration
vs **5.5%** avg. uplift Pl4y-Back campaign effectiveness norm

+8%

uplift in brand affinity
vs **5.5%** avg. uplift Pl4y-Back campaign effectiveness norm

Inclusion pays-off in more ways than one⁹⁷

The Inclusion = Income report from Unstereotype Alliance, developed in partnership with the Saïd Business School at the University of Oxford, shows that inclusive, non-stereotypical advertising delivers measurable commercial returns.

Campaigns that scored higher on progressive representation were more likely to drive purchase consideration and loyalty, translating into stronger short-term sales spikes and significant long-term sales growth.

62%

higher likelihood of being a consumer's 1st choice

15%

higher customer loyalty

3.5%

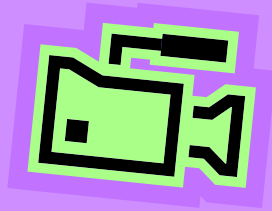
higher short-term sales

16%

higher long-term sales

That was why, but how?

**3 reflections based on 6 years
of insight.**



The story starts before it's told

Great campaigns don't begin on screen they begin with understanding. By researching audiences, listening to lived experiences, and testing ideas early, brands can unlock authentic insights that shape storytelling from the ground up. This proactive approach makes representation intentional, not an afterthought, ensuring from concept, to creation, to delivery, the narrative reflects real people's realities.



Challenge the things you've always done

For too long, advertising has leaned on narrow ideals of beauty, family life, and class. But we need to let go of outdated norms and portrayals to unleash creativity and connection. Push your ads to walk the line between aspiration and relatability, redefining socio-cultural norms along the way. Present success as joy, belonging, and confidence, not just wealth or 'perfection'.



Do the things you've never done

Representing the 'missing people' isn't just fair; it's helps to unlock vast consumer opportunities. By showing underrepresented groups in everyday lead roles, brands can challenge stigma, normalise inclusion, and bring massive audiences, eager to be seen, closer to the brand. Show the people we barely see and tell the stories that are rarely told.



Where? The trusted home for diverse voices

Audiences see Channel 4 as the place for alternative perspectives, authentic cultures, and underrepresented viewpoints.

Channel 4 has a reputation for representing different voices, cultures, and perspectives, and that's not just self-proclaimed, it's how our audiences describe us. This chart shows the trust we've built, through our remit and our role as a broadcaster that reflects modern Britain. This is the foundation we stand on.

As you consider your own journey into inclusive advertising, know that Channel 4's knowledge and experience are here to support you. Creating representation with real depth matters, and when it's done with care, it not only connects brands with consumers, but it also connects consumers with each other. That's how real social impact is made.

Which of these TV channels, if any, do the following statements most apply to?

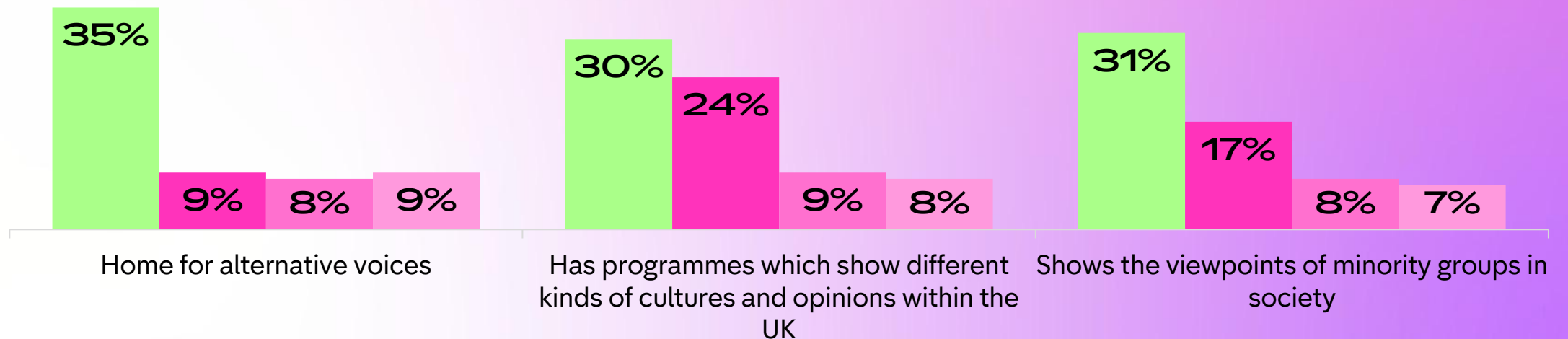
Q1 2025

Channel 4

BBC1

ITV

Channel 5



We can't do it alone

Channel 4's commissioners bring some of the most inclusive storylines to British screens, and at Channel 4, we want those stories to be interrupted by advertising that continues to reflect and celebrate the beautiful diversity of our country and beyond.

We can't do that without our wonderful advertising partners.

That's why, every year, we invest over £1m worth of air-time to collaborate with great minds who are driven to bring deeply connected narratives to our ad breaks.

Like this project, it's our gift back to the advertising industry and to our audiences who make Channel 4, Channel 4.



2016, Disability – Maltesers



2017, Mental Health – Lloyds



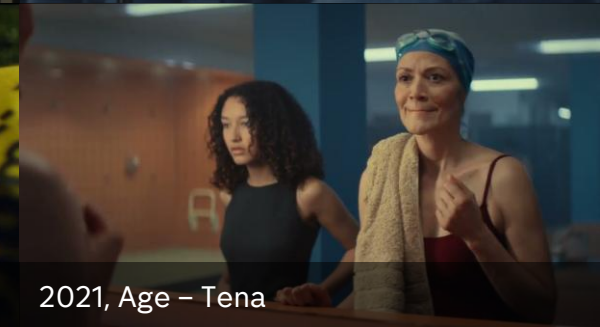
2018, Women – RAF



2019, LGBTQIA+ – Starbucks



2020, Ethnic Minorities – FIFA



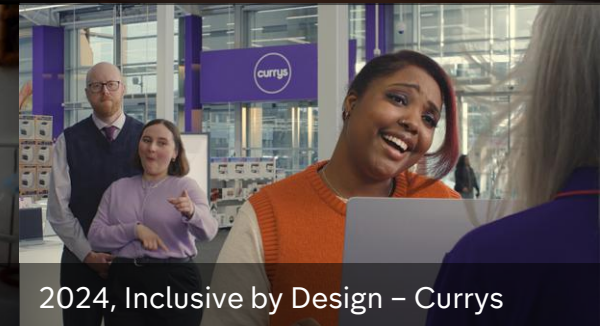
2021, Age – Tena



2022, Disability – Vanish



2023, LGBTQIA+ – E45



2024, Inclusive by Design – Currys



Thank you

For more information contact:
insightcommercial@channel4.co.uk

That's not all!

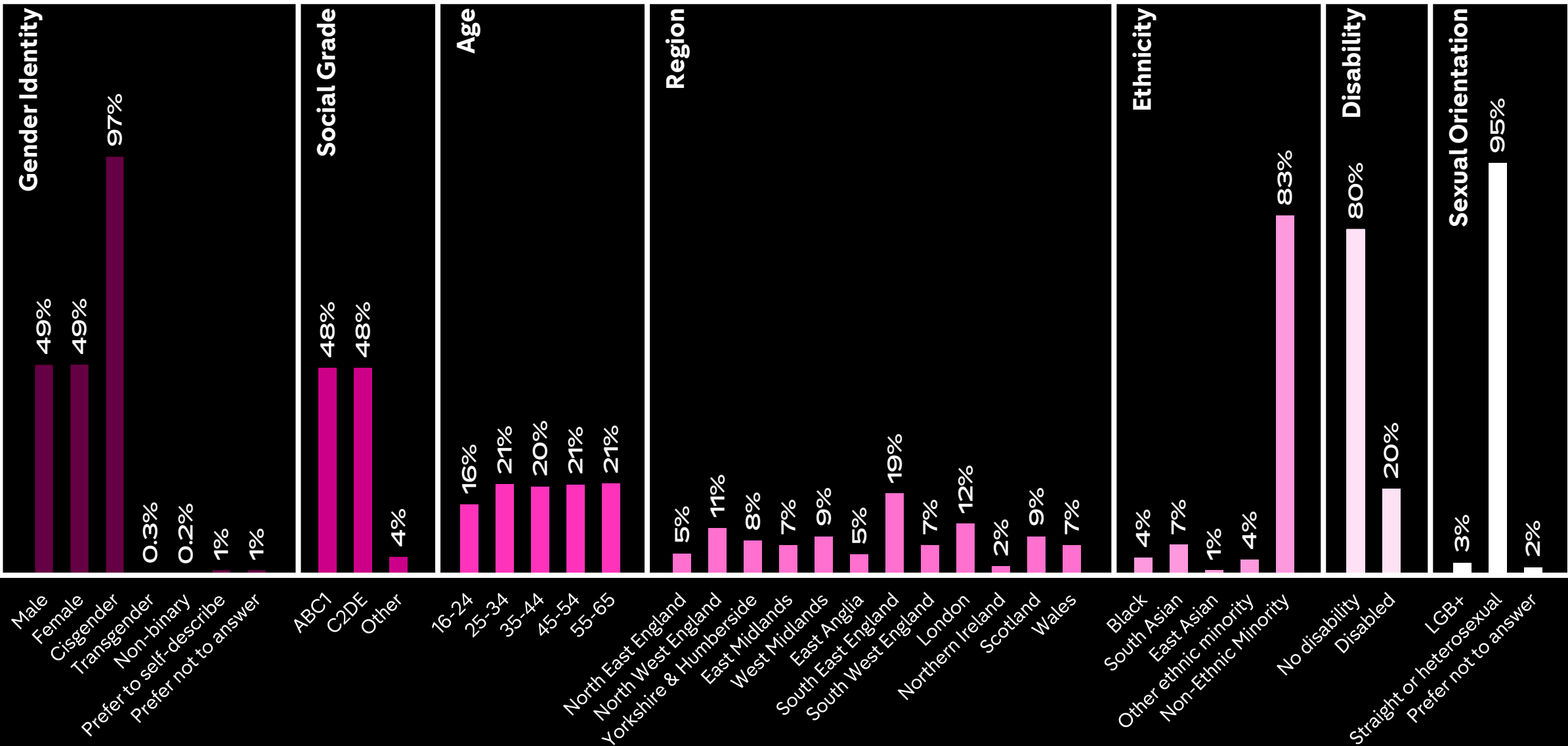
We'd love you to keep exploring how to improve the representation and portrayal of your consumers, reach out to find out more about our deep-dive Mirror On reports.



Appendix and Sources



Mirror On The Industry 2025 Consumer Survey Demographics



Sources 1/4

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9. Channel 4 & Tapestry. (2025). *Mirror On The Industry consumer survey: "[T2B] How affected are you personally by issues relating to diversity, equity, and inclusion?"* (Base: Nat Rep Adults N = 4,019 in 2023; N = 4,026 in 2025)
10. Channel 4 & Tapestry. (2025). *Mirror On The Industry consumer survey: "How would you define your attitude towards diversity, equity and inclusion (DEI)? Please select the option that feels most relates to you." [actively champion DEI – I believe it is essential for progress, I promote inclusivity, and I challenge inequities when I see them; I support DEI – I value diversity and inclusion and support related initiatives, though I don't always take a leading role; I feel neutral about DEI – I acknowledge it as a topic but don't feel strongly one way or the other; I have some concerns about DEI – I see some value, but I question aspects of its fairness or effectiveness; I do not support DEI initiatives – I believe they are often overemphasized or counterproductive and prefer a focus on merit without specific DEI efforts]* (Base: Nat Rep Adults N = 4,026 in 2025)
11. Channel 4 & Tapestry. (2025). *Mirror On The Industry consumer survey: "[T2B] How much do you agree or disagree with the following? Over the last 2 years..."* (Base: Nat Rep Adults N = 4,019 in 2023; N = 4,026 in 2025)
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