

MIRRORS & WINDOWS

Identity and media choices
in modern Britain



Contents

Introduction	3
01 What do we mean by identity?	5
02 People want to tackle inequality — but don't always know how	9
03 Content as a mirror and a window	15
04 Where is there room for improvement for U.K. media?	19
05 What drives love and trust in media today?	34
Be relevant to my desires and interests	35
Represent who I am	37
Nurture respectful community	38
06 Deep dive: YouTube under the lens	40
Be relevant to my desires and interests	41
Represent who I am	46
Nurture respectful community	51
07 The U.K.'s media and advertising industries are focused on DEI	56
08 Why media matters in this moment	63
09 Brighter mirrors, clearer windows	68
10 Appendix	72

INTRODUCTION

Over the past two decades, the way that audiovisual media is created, consumed, and critiqued has changed more than at any time since the first national television broadcasts began in the 1920s. At the same time, campaigns such as Pride, #MeToo and Black Lives Matter have made questions of representation and identity part of the national and international conversation.

Google's U.K. Insights team wanted to understand more about how people's media choices are influenced by and interact with their sense of identity. We initially focused on YouTube, but soon broadened our approach to cover a wider range of audiovisual media platforms that reflect the diverse media landscape of the U.K. today. This report explores our findings both in relation to the broader U.K. media ecosystem, and YouTube's role within it.

We began by reviewing existing literature, conducting cultural analysis, and consulting industry experts. We found there is an important and growing body of evidence relating to diversity, equity, and inclusion in the media industry. In particular, a great deal has been written about the importance of ensuring that content (including advertising creative) is representative of its audience, both in front of and behind the camera.¹ While we also address representation in this report, our main focus is the way people's sense of identity interacts with and informs their media choices. What inspires people to love and trust the content they watch? And what are the implications for the U.K. media industry?

After this initial scoping phase, we went on to conduct an online survey of more than 10,000 British people, from every corner of the country and varying walks of life.² We asked participants about their attitudes towards 10 of the most popular media brands available in the U.K.,³ including traditional broadcasters like the BBC and ITV, streaming heavyweights such as Amazon Prime Video and Netflix, and open platforms such as Instagram, TikTok and YouTube.⁴

Research consultancy MTM helped ensure that our approach was as representative as possible, and we engaged research inclusion and accessibility specialists Open Inclusion to help us reach people who are typically (if unintentionally) excluded from studies of this kind.

We learned a lot from this process, and our research revealed many insights, but three stand out in particular:

- **Identity is complex – and plays a central role in shaping people's media choices.** Protected characteristics matter and are key components of identity. But they aren't the only components, or even necessarily the most important. Many participants in our research defined themselves as much by their hobbies, passions, and communities. It's this unique sense of identity that informs what people watch.
- **Open platforms support the creation and distribution of representative and inclusive content.** People value media services with content that mirrors their lives, and also those that provide a window into the lives of others. By lowering barriers to entry for creative talent in the U.K., open platforms diversify the U.K. media talent pool and ensure audiences across the U.K. can find personally relevant and relatable content.
- **People care about diversity, equity, and inclusion, but are also anxious about making mistakes.** Across the board, consumers and advertisers told us they care deeply about inequality, but don't always feel comfortable talking about issues of identity and representation. Some advertisers and media buyers have responded to this anxiety by restricting where people can find their content. But, as many in the industry are beginning to acknowledge,⁵ this can unintentionally limit brands from reaching diverse audiences, and lead to talented creators being cut off from opportunities to monetise their content.

Our research ultimately reveals a complex media ecosystem, in which passionate audiences seek out content from an increasingly diverse group of creators, because those creators speak to the many different facets of identity in the U.K. today. The media landscape has undergone a profound transformation and this presents new challenges, particularly around how to support and sustain an expanded creative economy.

But before we dive into the results and analysis, we need to take a brief moment to set out exactly what we mean when we talk about "identity".



What do we
mean by
identity?




What do we mean by identity?

Questions of identity – such as “who am I?” – are complex. Research in the field is rapidly evolving and many aspects of identity are still being actively debated and investigated by academics. However, for the purpose of this report, we’re going to use the following as our baseline understanding of the term.

Many people think about identity as a series of layers. These layers might start with our core sense of self, then take into account our family members, friends, and colleagues, and eventually include a broader set of affiliations at the community, national, and even international level. Several of these layers of identity – such as age, race, sexual orientation, gender reassignment, and religion or belief – are protected by law, to prevent people being discriminated against on the basis of who they are. Many of these legal recognitions have been hard won, and in grouping them together we don’t intend to diminish any individual characteristics or draw comparisons. We have sought to be clear where we found differences in perceptions between different audiences. Where the same opinion prevails across audiences, we reflect the U.K. as a whole.

While some parts of our identities are given to us at birth or by circumstance, many of the most important aspects arise from the choices we make. What would I like to do with my life? Which values and principles are most important to me? What are my passions? Which aspects of my cultural environment resonate with me and enrich my life? As this word cloud drawn from our survey responses shows, when given the opportunity to describe ourselves, our passions, interests, and personalities are almost as prominent as family among the terms we use to define ourselves – and much more numerous.

As we explore the findings of this research, it might be useful to hold this visualisation in mind. People are never just a single trait; identity is vastly more nuanced and intersectional than that. While some aspects of identity may remain fixed throughout our lives – or rise to prominence in certain moments – others evolve as we grow, and as our lifestyles and priorities change. We are all multifaceted. While demographics and protected characteristics matter a great deal, according to our respondents they aren't the only – or even necessarily the most important – lens through which we view ourselves. As one of our interviewees put it:



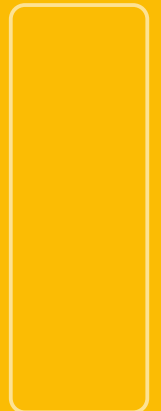
I'm not just someone who's transgender ... I watch more YouTube videos about dogs than about being transgender! I like animals, gaming, and fitness videos.

MORGAN²

18-24, TRANSGENDER MAN, PAKISTANI, SCOTLAND

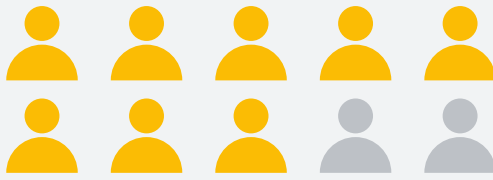


People want to
tackle inequality
— but don't
always know
how



People want to tackle inequality — but don't always know how

Movements such as Pride, #MeToo, and Black Lives Matter have elevated questions of social justice and belonging within mainstream conversation. Brexit and similar political movements around the world have ignited new conversations about national identity. Wherever people sit on the political spectrum, they want to see their values and identities reflected in the world.



More than **8 in 10 people** are concerned about inequality or discrimination on the basis of protected characteristics such as gender, sexuality, disability, and religion

In our survey, 85% of people in the U.K. expressed concern about inequality and discrimination based on gender, sexuality, disability, religion, and other protected characteristics of identity. While concern is significantly stronger among some audiences, a high level of concern is shared across the board, including sub-audiences grouped by gender, sexual orientation, ethnicity, region, and socio-economic grade (figures 02A and 02B).

While concern is significantly greater among some audiences, a high level of concern is shared across audiences

% concerned about inequality and discrimination on the basis of protected characteristics

Age

18-24	92%
25-34	89%
35-44	86%
45-54	81%
55-64	80%
65+	81%

Gender

Women	89%
Men	80%
Non-binary	95%
Transgender	94%

Sexual orientation

Asexual	89%
Bisexual	92%
Gay or lesbian	93%
Heterosexual	84%
Pansexual	97%

Ethnicity

Asian	92%
Black	93%
Mixed/multiple ethnic	93%
White	84%

Disability

Dexterity	87%
Hearing	85%
Mobility	87%
Neurodiversity	92%
Sight	89%
Speech	89%

Socio-economic grade

AB	86%
C1	86%
C2	83%
DE	83%

Significantly **higher** or **lower** than the general population (at 95% confidence level)

FIGURE 02A

Sample of sub-audience results reflecting concern over discrimination on the basis of protected characteristics. Extremely, very, moderately, or slightly concerned²

**% concerned about inequality and discrimination
on the basis of protected characteristics**

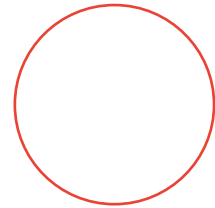


Significantly **higher** than the general population (at 95% confidence level)

FIGURE 02B

Concern over discrimination on the basis of protected characteristics across regions of the U.K. Extremely, very, moderately, or slightly concerned

But despite high concern about discrimination and inequality, a majority also said they are worried about saying the wrong thing in relation to these topics. This remains true for those who say they are particularly concerned about inequality and discrimination.⁹ In fact, many audiences say they are concerned about their ability to speak about these subjects without misstepping and facing scrutiny, including 50% of Black-identifying respondents and 62% of people with disabilities. While figures are lower among younger respondents (49% for 18-34-year-olds, compared to 65% for 55+), in every sub-grouping in our study there are considerable numbers of people who are worried about the personal consequences of having these discussions in public (figure 03).



Many audiences say they feel unable to express themselves

% who feel they can't express their real opinion
in case they get accused of being sexist or racist

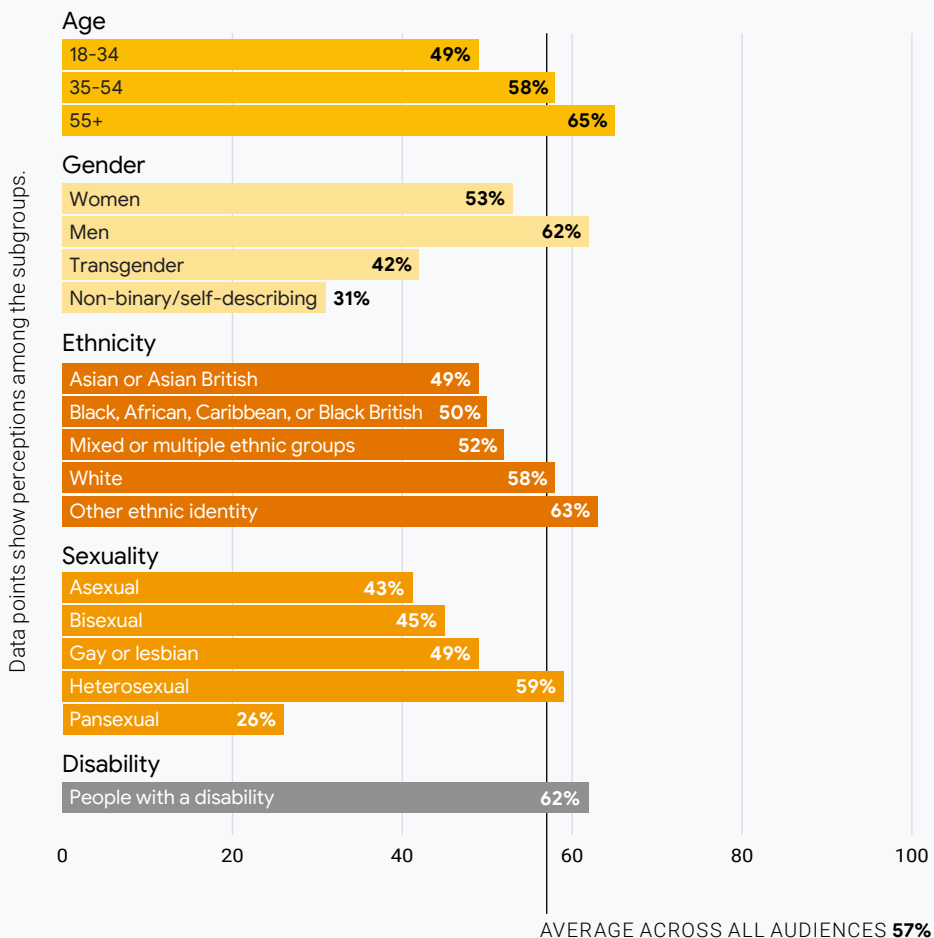


FIGURE 03

% agreement across various audience subgroups indicating the degree to which they feel they can't express their real opinion in case they get accused of being sexist or racist. Completely, strongly, slightly agree¹⁰



Content as a mirror and a window



Content as a mirror and a window

The openness of the internet means we can now find content that reflects almost any aspect of our lives — or the lives of others. We can therefore think of the sheer scale of content as a mirror in which we can see ourselves, and a window through which we can look at the wider world. And if there's nothing that quite meets our expectations, we can even make content ourselves and put it out for others to find, with several platforms offering near-global distribution.

The media landscape in Britain is now vastly more complex than it was when the Radio Times only covered four TV channels and radio, and viewers were divided into groups defined by their loyalty to the BBC or ITV. Audiences now have access to hundreds of linear channels, streaming services add new shows and movies each week, and creators across the world upload thousands of hours of content daily (with 500 hours of video uploaded every minute to YouTube alone).¹¹

A new generation of creators has risen to this opportunity, making content that reflects their individual experiences. Whether it's mountaineering in the Scottish Highlands, animation reviews in Northern Ireland, or sewing in the West Country, the ability to create and upload from anywhere has resulted in a breadth of stories being told from around the country.¹² In turn, this depth of material means that audiences across the U.K. can find content they love.¹³ Many creators are now brands in their own right and make a major contribution to the U.K. creative economy. According to research by Oxford Economics, YouTube's creative ecosystem alone supports the equivalent of over 40,000 full-time jobs and contributes £1.4 billion to U.K. GDP.¹⁴

“I WANT EVERYONE TO FEEL LIKE THEY KNOW ME”



MAHALIA: YouTube creator and musician

Growing up in Leicester, Mahalia used songwriting to express her feelings and performed in front of friends and family. Sharing her music on YouTube meant she could take her sound to a global audience of millions:

“I want everyone to feel like they know me, like we’re just hanging out ... There was a clip of me singing at a show I did in London. It was when I was 13. It was a video from that gig that made it on to YouTube.

That was the first time that it felt like my music was extending further than friends and family.”



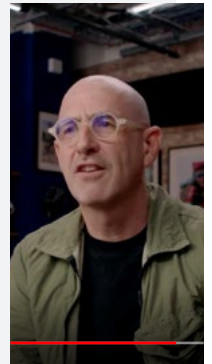
WE'RE CREATING VIDEOS EVERY SINGLE DAY



GCN: YouTube creators and sports presenters

GCN is a group of cycling fanatics who began as a small team making videos on YouTube and have since grown to become a media company employing hundreds of staff to produce their content, from filmmakers to graphic designers:

“GCN is the biggest cycling channel on YouTube. We’ve created 15,000 videos for YouTube and we’re creating videos every single day. Simon and I **were both working in traditional media and this is an opportunity to do something totally different. We had the idea but YT gave us the platform** and toolset to bring our idea to life. We had one video camera and one person who knew how it worked. And **we’ve gone from literally filming in the cupboard to having this building with 14 studios** and incredible kit and equipment. **The thing I’m most proud of is that we’ve created hundreds of great jobs.** You know, great filmmakers, great graphic designers, data analytics, e-commerce — you name it — it’s a huge operation. New people start every week and I think every role is important. It’s a genuine team effort, end to end.”

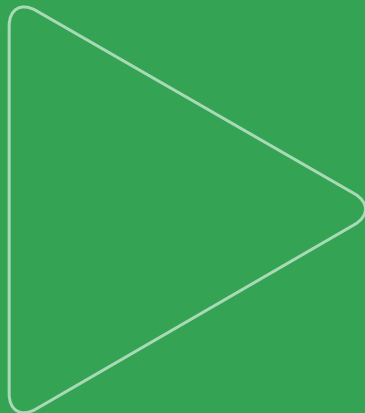


You can explore more YouTube creator stories from across the breadth of the U.K. [here](#).





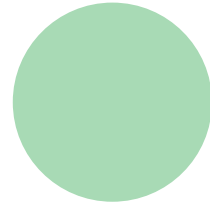
Where is there
room for
improvement
for U.K. media?



Where is there room for improvement for U.K. media?

Media has an important role to play in fostering a sense of inclusion in the U.K. We found that people want content that makes them feel part of a like-minded community. This is true whether the content has conversational elements by design (as with platforms that include commenting and replies) or is typically discussed offline among friends, family, and colleagues. Whether it's passion for a football team or fascination with an unfolding mystery, good content — wherever it is hosted — has tremendous power to bring people together.

Overall, respondents told us they feel the media is performing well in several key ways, including by providing content from both the U.K. and the wider world, and by representing a wide range of voices, people, and perspectives (figure 04).



U.K. media exhibits a variety of strengths

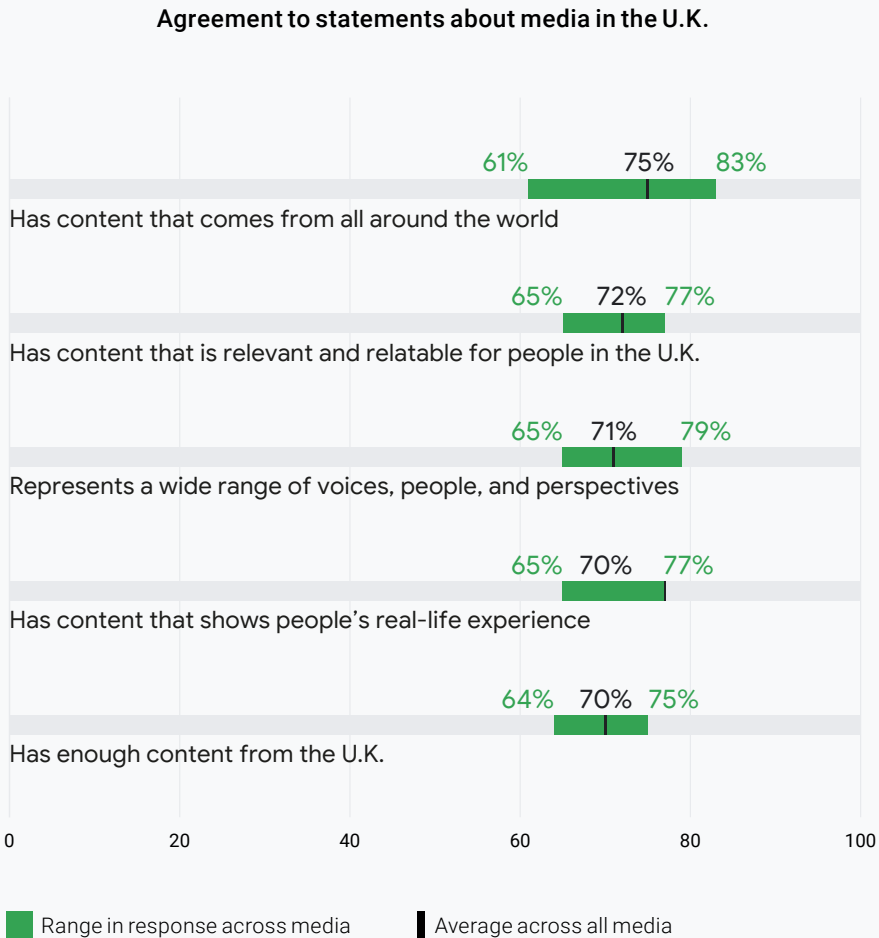
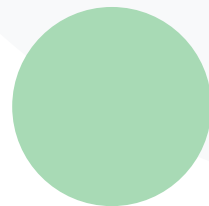
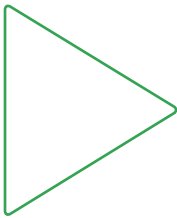


FIGURE 04

Best-performing attributes of media in the U.K. based on average agreement across media among U.K. general population. Attributes where average $\geq 70\%$. Brands included in average and range are: YouTube, TikTok, Instagram, Facebook, Twitter, Netflix, Amazon Prime Video, BBC, Channel 4, ITV¹⁵

When we asked viewers whether the media provides content that is relevant and relatable for people in the U.K., all 10 platforms in our study performed well, averaging a 72% positive response rate (figures 04 and 05). In terms of having adequate content from the U.K., viewers rated traditional broadcasters such as the BBC (74%), Channel 4 (72%) and ITV (71%) above or at parity with the average (figure 06). For the most part, these platforms were also rated favourably for reflecting the diversity of the U.K. (figure 07). However, when viewers were asked if a platform's content is "for everyone", traditional media scored below average – while Netflix, YouTube, and TikTok received the highest positive responses (figure 08).¹⁶



Media platforms provide relevant content created by and for people in the U.K.

Has content that is relevant and relatable for people in the U.K.

% of monthly users for each brand who agree

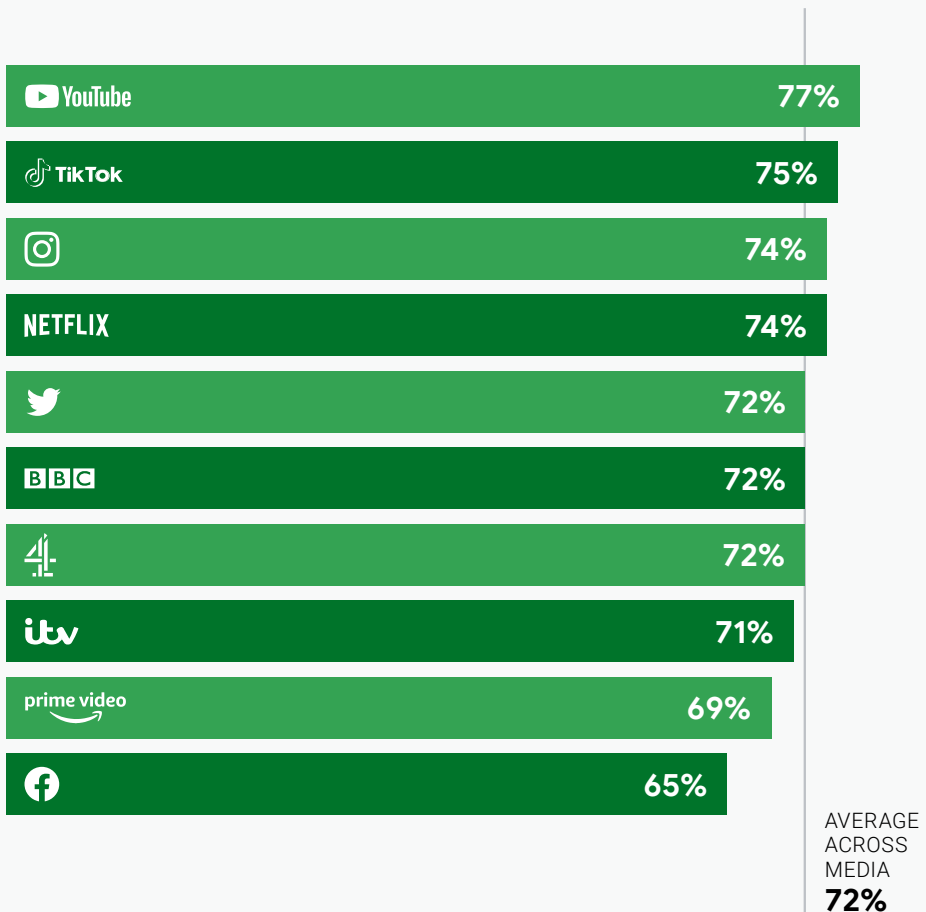


FIGURE 05

Has enough content from the U.K.

% of monthly users for each brand who agree

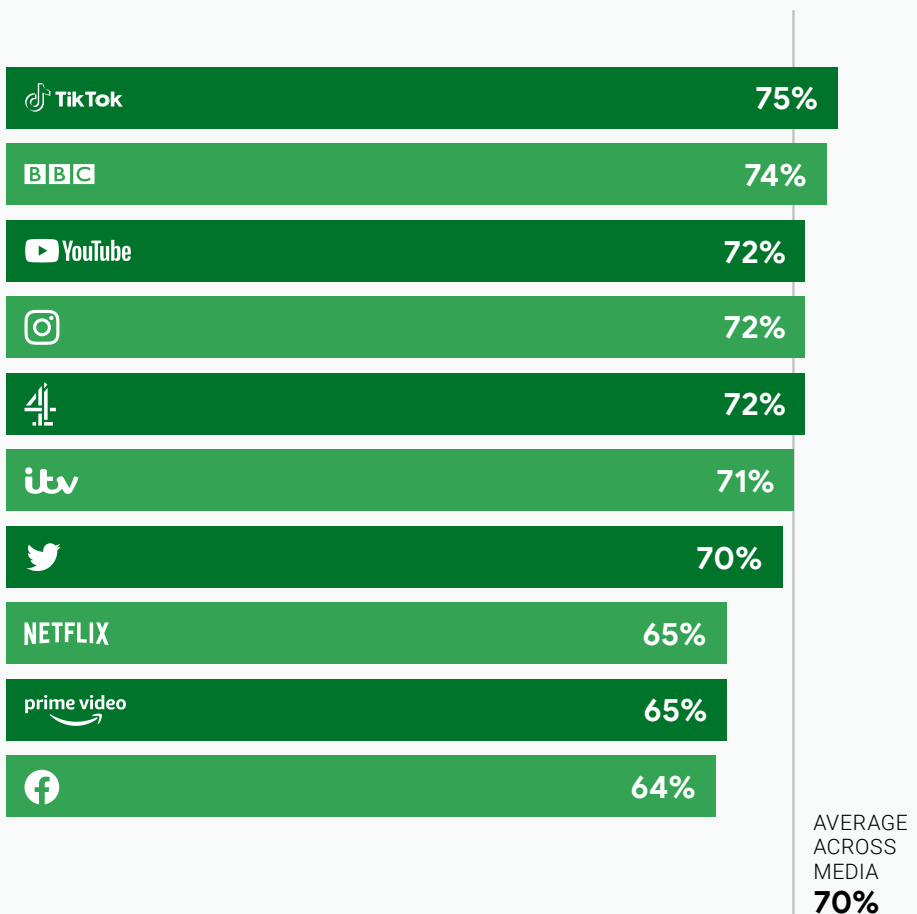


FIGURE 06

Has content that reflects the diversity of the U.K.

% of monthly users for each brand who agree

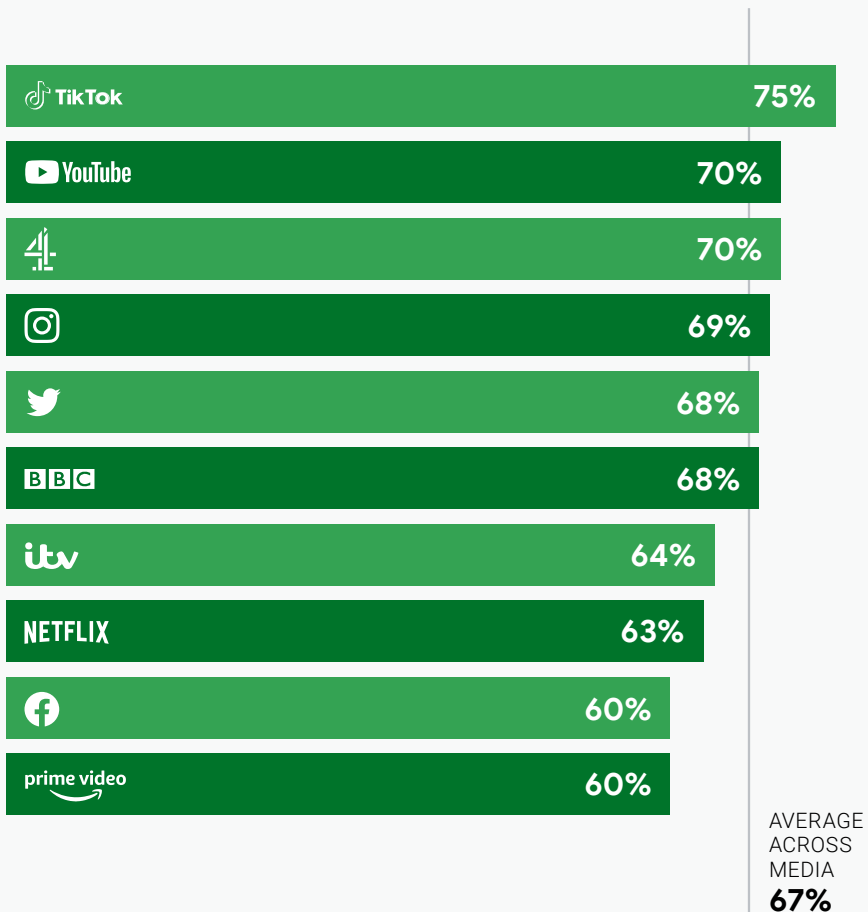


FIGURE 07

[Brand] is for everyone

% of monthly users for each brand who agree

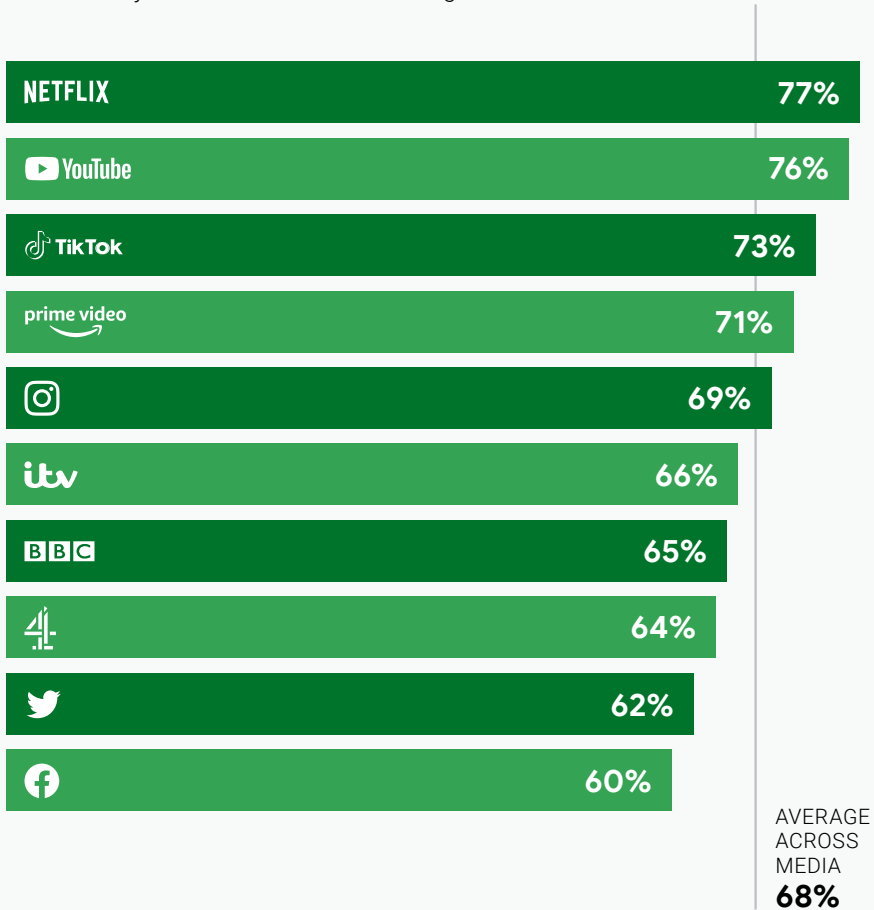
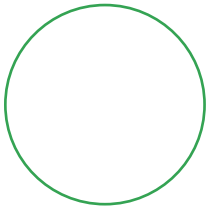


FIGURE 08

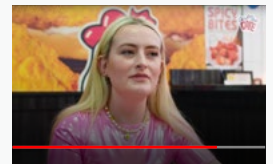
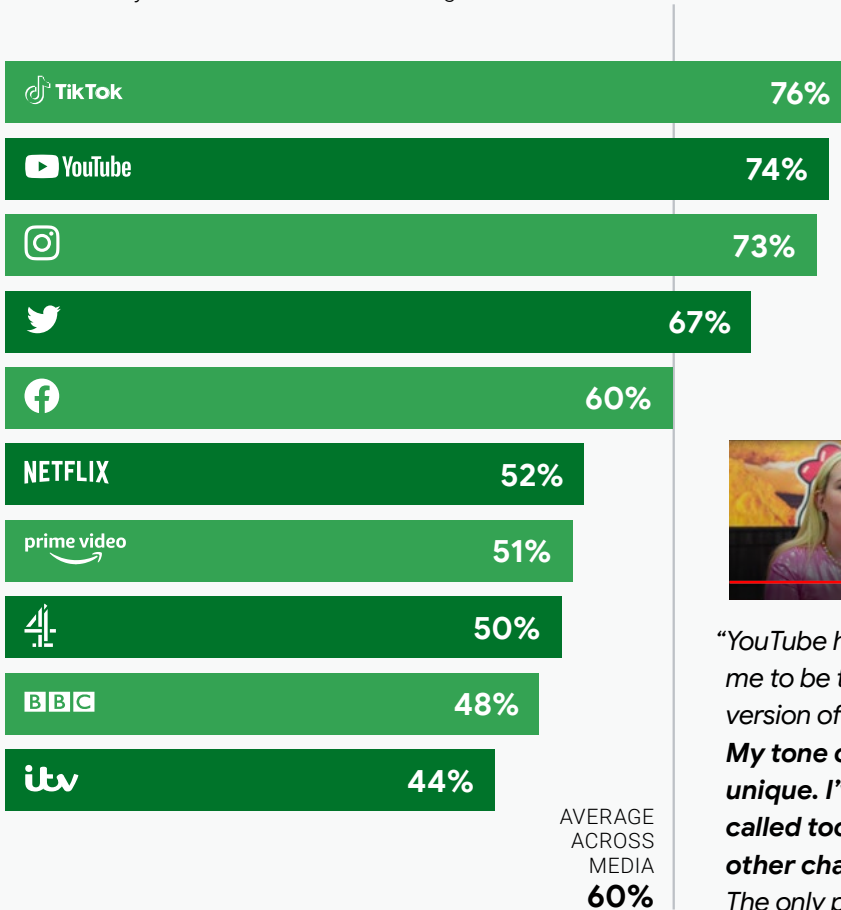
Turning to equity of content creation and production, many people believe that living outside London can restrict access to careers in creative industries such as broadcast television – despite pushes to expand broadcasting operations beyond the capital.¹⁷ On this front, it is unsurprising that open platforms significantly outperform linear television and streaming video for perceptions of equity. When respondents were asked which media platforms “support a diverse range of content creators”, TikTok, YouTube, and Instagram lead the way, each scoring more than 10 points above the average positive response of 60% (figure 09).



Open platforms are rated more positively for supporting a diverse range of content creators

Supports a diverse range of people to become content creators

% of monthly users for each brand who agree



“YouTube has allowed me to be the weirdest version of myself.

My tone of voice is unique. I’ve been called too niche for other channels.

The only place for me was YouTube ... where anyone with any style or tone can upload and find viewers.”

**AMELIA
DIMOLDENBERG**

FIGURE 09

While our analysis found sentiment about the U.K. media is generally positive (figure 04), our respondents believe there is still room to improve — and there are areas where all audience sub-groups are a long way from being seen as represented well. On the whole, media brands in our survey scored well for reflecting the U.K., but it was also clear that viewers see some parts of the U.K. being better represented than others. Our respondents felt young and white people are most likely to see their experiences mirrored in the media. Fewer than a third of respondents said people with disabilities and older adults are well represented (figure 10).



There's been movements which have progressed some issues, but there hasn't been a campaign or movement for disabled people. From a cultural perspective, people with disabilities are often left out and as a result can be perceived very differently.

DAVID

25-34, MAN, VISUAL DISABILITY, EAST MIDLANDS

Viewers believe media brands in the U.K. have work to do in terms of improving on-screen representation

% of general population who say media in the U.K. represent each audience well

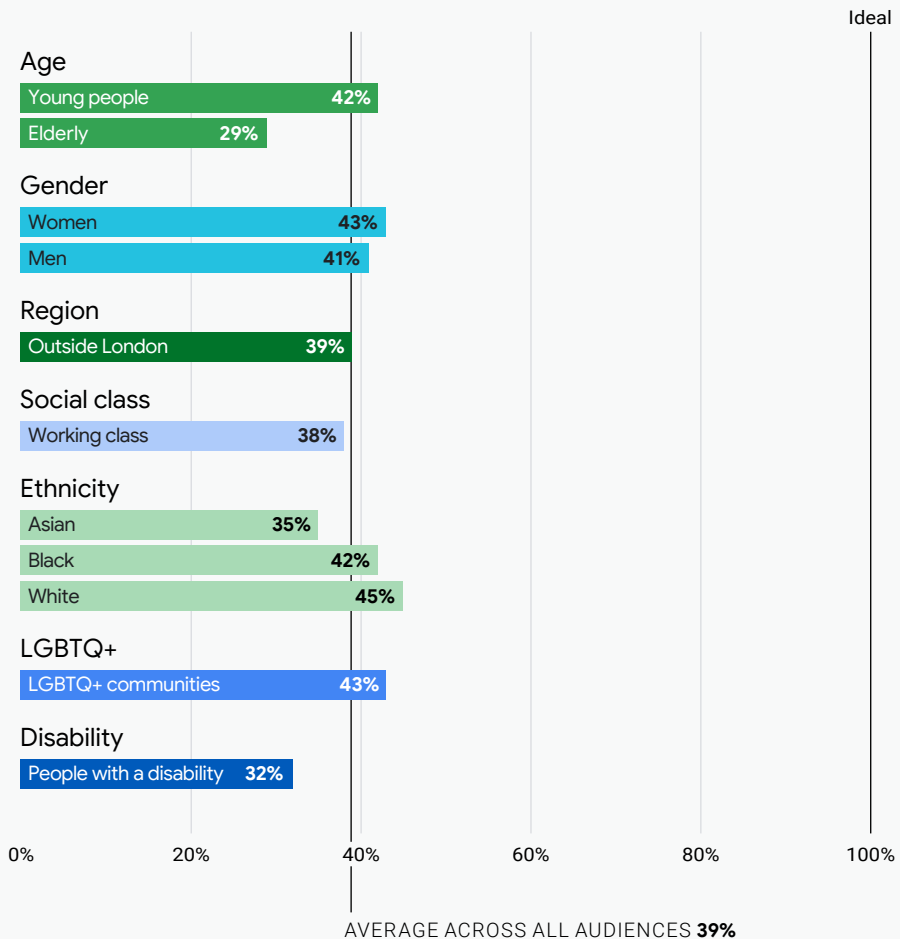
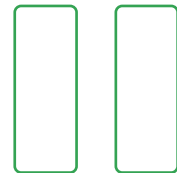


FIGURE 10

% of U.K. population who say media represent each audience well. Average across all media in test (pattern consistent across all media irrespective of platform – all have room for improvement). While these results are among the total sample, looking at the results among sub-audiences reveals a consistent story¹⁸

To better understand the experiences of people who are often excluded from these kinds of studies, we worked with a specialist inclusion research partner to survey a panel that included people with disabilities and other research access issues.¹⁹ This panel reported feeling that their experiences were under-represented in the media and said basic accessibility is still a problem. Across all media brands, this panel's feelings about representation of people with disability-related accessibility issues were significantly less positive than those captured by our main survey — even when comparing only respondents with disabilities and when controlling for necessary methodological differences.²⁰ In fact, people with a disability who were part of our inclusive research panel felt considerably less proud, represented, noticed, understood, or included in media content — scoring each of those statements at between 9-19% on average across U.K. media platforms. Again, even accounting for necessary methodological tweaks, this is considerably lower than the 45% average seen across the U.K. general population (or 48% among people self-identifying with disabilities in the general population survey, see figure 11).²¹



Quotes from the Open Inclusion research participants on representation in U.K. media²²

Representation

“I’d appreciate more relevant portrayals of disability, including a positive reflection on people’s lives.”

“The way that elderly disabled people are portrayed is awful. I am a highly educated academic who happens to be in a wheelchair. Please tell me where I would find any representation of myself? All I see is a caricature of what my life is like.”

Accessibility

“Being totally blind, I’d appreciate more audio description.”

“Accessing the media for the visually impaired community is extremely tough. Although there is audio description, it is not always available and there are no speech to text tools that can be used, which makes it impossible to access the channel or programme you want to listen to. Menus and text have no audible facility.”

Research participants from our inclusion panel reported that their lived experience was significantly less well represented across media, compared with the U.K. general population

% who agree that “content reflects me, my identity, and my culture”

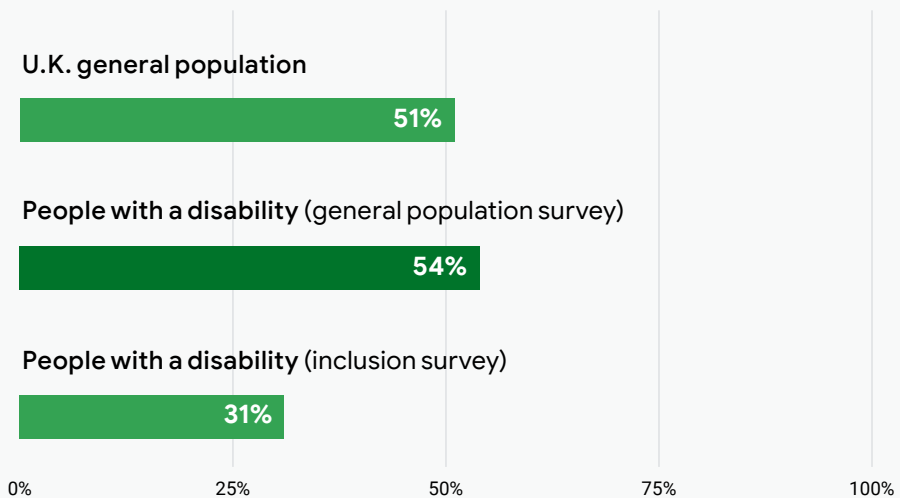
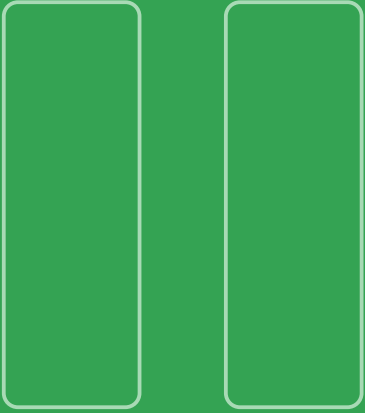


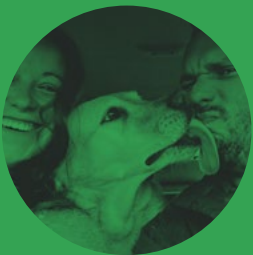
FIGURE 11

% agreement to sentiment that media “content reflects me, my identity, and my culture”, comparing the U.K. general population to people with a disability. Average across media brands surveyed²³

In sum, our research reveals a media landscape in which different platforms exhibit a variety of strengths — and a handful of important weaknesses. So how should brands and advertisers think about building love and trust with their audiences?



What drives
love and trust
in media today?



What drives love and trust in media today?

To answer this vital question, we grouped together responses received during the quantitative part of our research. We considered nearly 100 different attributes and used factor analysis to group them into themes. This process enabled us to identify a handful of key drivers that have the biggest impact on emotional engagement for U.K. audiences.²⁴ According to our analysis, in order to build love and trust, viewers want media brands to:

- Be relevant to my desires and interests
- Represent who I am
- Nurture respectful community

These three drivers show the importance of the media acting as a mirror for viewers' passions and interests, and a window opening out into the wider community. We all want content that makes us feel seen and heard, and we also want content that opens up our perspectives so we can engage respectfully with the lives of others. When we used our three love and trust drivers to examine the 10 media platforms in our study, we discovered some instructive and surprising findings.

Be relevant to my desires and interests

People enjoy platforms that reliably recommend new, relevant content. When it comes to knowing their audience and suggesting content they would enjoy, streaming services Netflix (72%) and Amazon Prime (66%) are rated highly, with TikTok (69%) and YouTube (63%) also scoring well.

Most of the brands in our survey are rated highly for presenting content that reflects the full diversity of the U.K. and for providing relevant and relatable content for people in the U.K. (figures 05 and 07). But when it comes to offering content from all over the world, YouTube and Netflix match their strong local representation with a strong worldwide footprint and are rated as the most global services in our survey (83% agree YouTube has content from all over the world, Netflix scores 82%). This pattern is reflected in perceptions around breadth of content. YouTube and Netflix also rank highest among U.K. audiences for hosting a variety of content that means "I can always find something to watch that is personally relevant to me" (figure 12).

Netflix, TikTok, and YouTube stand out for hosting a breadth of personally relevant content

The variety of content available on [service] means I can always find something to watch that is personally relevant to me

% of monthly users for each brand who agree

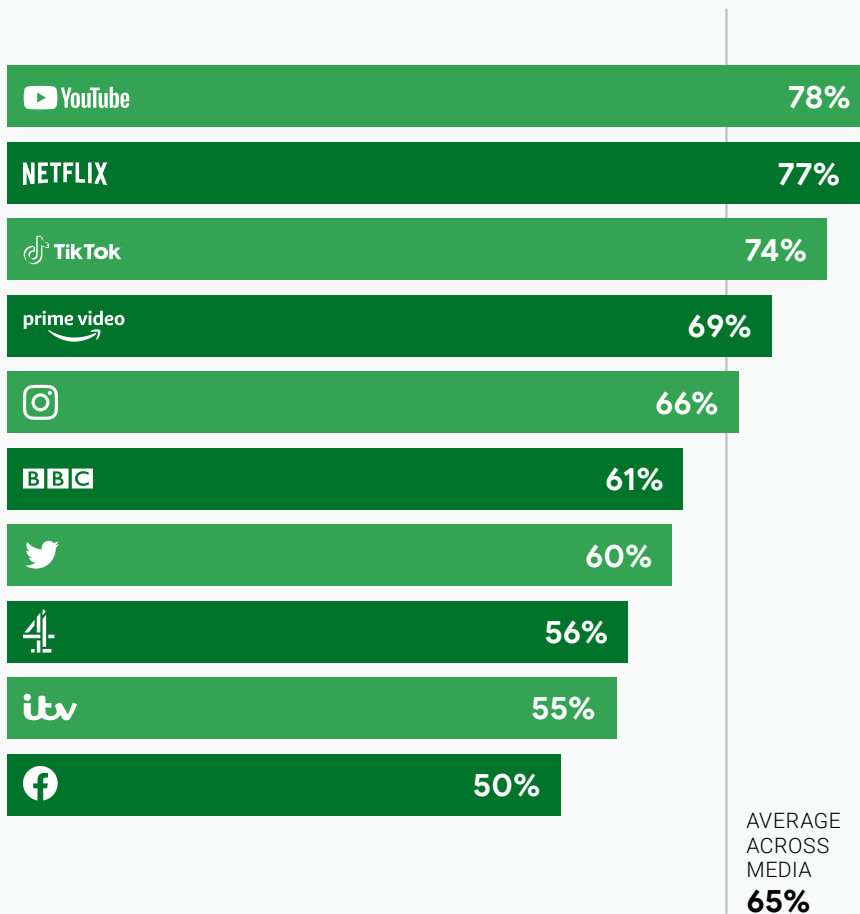


FIGURE 12

Everyone appreciates being able to dig into the topics that matter to them but, according to our survey, some platforms perform better for certain groups than for others. Among people with disabilities, YouTube (68%) and TikTok (67%) both ranked highest for going more deeply into personally meaningful topics, compared to a range of 48-53% who believed the broadcasters did the same. Broadcasters scored slightly better with respondents identifying as LGBTQ+,²⁵ 49-58% of whom rated them positively for their depth of coverage on meaningful topics. But YouTube (72%) and TikTok (68%) again stand out here. We saw a similar pattern in the responses of trans audiences, 72% of whom believe YouTube offers personally relevant content, 65% of whom say the same for TikTok, and an average of 53% of whom feel they can always find personally relevant content from traditional broadcasters.

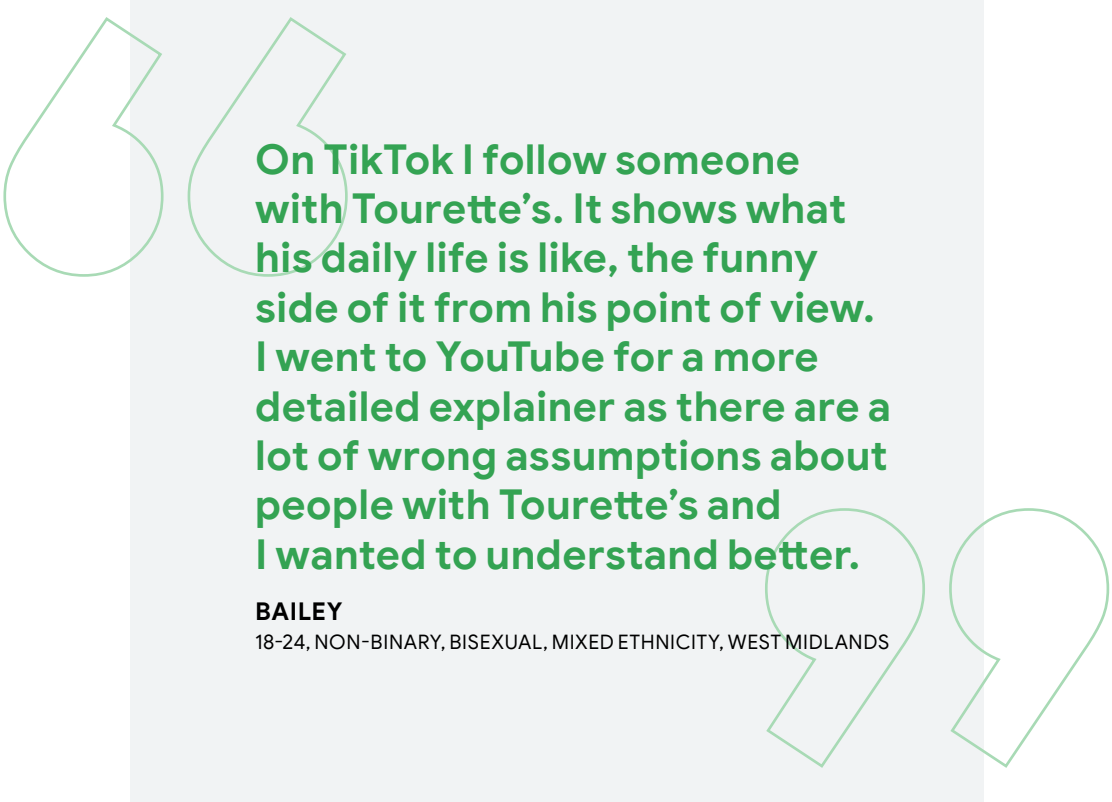
Represent who I am

By their nature, open access content platforms offer global distribution to almost anyone with an internet connection. It's therefore no surprise that our survey found these services excel at presenting a wide array of voices, with more than three-quarters of respondents saying that Instagram, TikTok, and YouTube enable everyone to create content. These services also have higher perceptions of supporting a diverse range of people to become content creators, and lead the way in being seen to represent a wide range of voices, people, and perspectives, especially compared with broadcasters and SVOD platforms.

Authenticity matters in identity and representation, and this is an area where some platforms do less well. With the exception of TikTok (73%), social media sites generally score lower (55-66%) on the question of whether their content feels real and authentic compared to both linear television (64-68%) and YouTube (74%).

Nurture respectful community

Perhaps it will be surprising to some, but platforms with a social component also performed well when audiences were asked which services offer content that nurtures respect. TikTok and YouTube users believe that the content on those platforms helps to increase empathy. This view is even more apparent among more frequent users of media services. When we focus on weekly users, scores for questions relating to empathy and community tend to increase by 3-10 percentage points, depending on the service.



On TikTok I follow someone with Tourette's. It shows what his daily life is like, the funny side of it from his point of view. I went to YouTube for a more detailed explainer as there are a lot of wrong assumptions about people with Tourette's and I wanted to understand better.

BAILEY

18-24, NON-BINARY, BISEXUAL, MIXED ETHNICITY, WEST MIDLANDS



I have a couple of friends who have autism and want to learn more about how to support them. I've been watching videos about how to best support people with autism. It helps me to deepen my understanding of people who are different to myself.

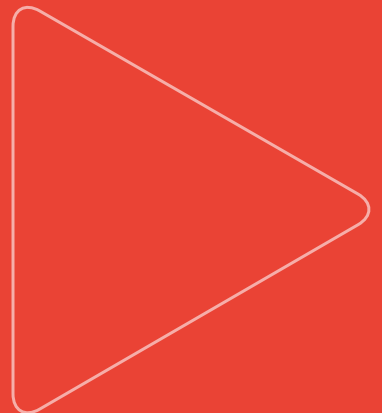
JANE

25-34, WOMAN, WHITE, YORKSHIRE

Providing people with the means to tell their own stories is a powerful way of increasing inclusion. For this reason, respondents rated YouTube, TikTok, and Instagram more favourably on the diversity and authenticity of their content than broadcast and streaming media. It seems that giving people the means to tell their own stories leads to more stories being told and, in turn, more viewers feel seen and represented.



Deep dive: YouTube under the lens

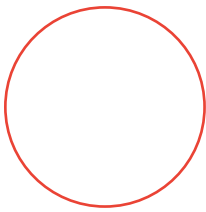


Deep dive: YouTube under the lens

So far we've been looking at the U.K. audiovisual media landscape as a whole, and we've discovered some fascinating findings about what audiences want from content and how they see themselves and others represented on screen. Now we're going to focus specifically on YouTube's performance, drawing on some deep user insights and complementary research we've published in recent years.

Be relevant to my desires and interests

People love content that speaks to their passions. This is an area where YouTube's openness and global footprint help it excel, with 76% of people agreeing that they can dig deep into their interests and passions on YouTube (significantly ahead of all other brands in our survey).



YouTube allows users to dig deeper into their interests and passions

Is a place where I can dig deep into my interests and passions

% of monthly users for each brand who agree

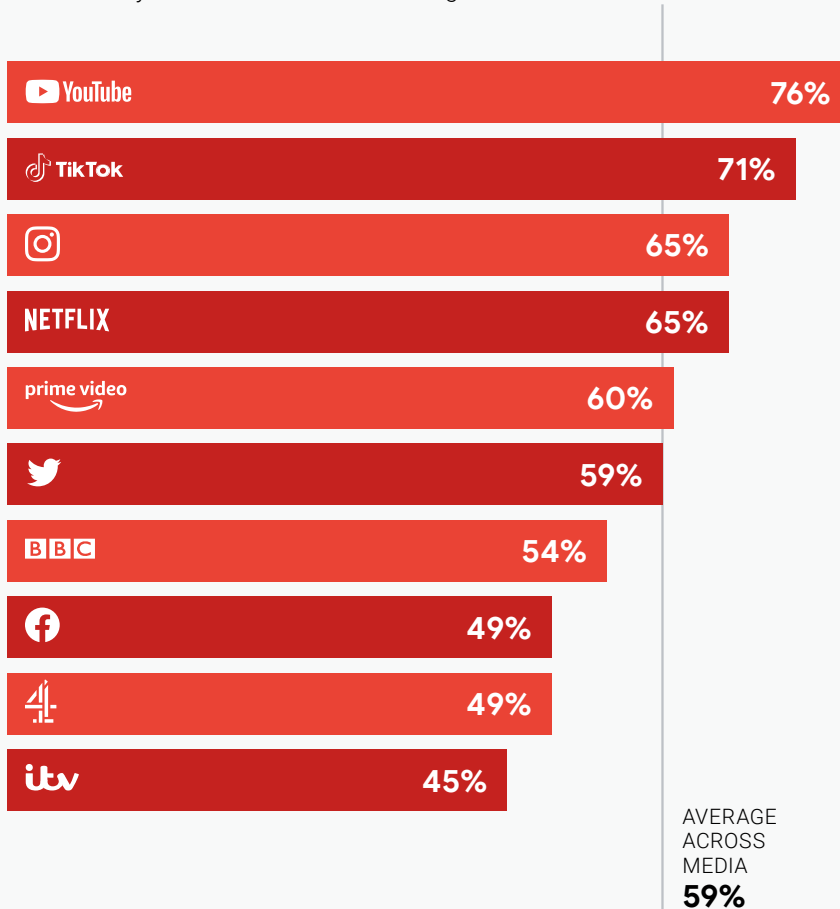


FIGURE 13

“YOUTUBE GIVES YOU THE OPPORTUNITY TO LOOK BACK AND ... PLAN FOR MY FUTURE”



YOUTUBE USER: Michael, 46, GCN fan, Derbyshire

“I buy the components and just build the bike from scratch. Once you’ve watched a few videos it’s fine. It’s amazing how many people I go bike riding with who can’t even fix a puncture. **You can learn a lot and build your confidence ...** I think cycling is a great way to see the country and the countryside, it’s the perfect speed to see everything ... **YouTube gives you that opportunity to look back at what people were doing** back in the ’50s, ’60s, ’70s, at the sailing centre I used to work at and **places I’ve been. But it also lets me look forward as well** — not just look at what other people are doing but **plan for my future as well**. When I first started looking, it was random, I was looking at all sorts of different things, and then **I realised it was a bit more of a tool that I could benefit from in terms of knowledge**. So instead of just watching things that were mildly amusing, I could then realise it was more of a tool for research so I could find out more about bike maintenance, things I was interested in, geographic areas as well. **I see it more as a resource now than as something that just passes the time.**”²⁶



The value of openness in creating diverse and inclusive content is one of the standout themes of the research, and this is reflected in the 79% of people who say that YouTube has unique content that they can't find anywhere else. This sentiment is shared among various audiences, including YouTube users identifying with multiple ethnic groups (84%), as Asian or British Asian women (82%), as LGBTQ+ women (80%), and as trans (79%).

These findings complement a previous investigation into the [personal connections viewers establish with the videos they watch on YouTube](#). That research showed that videos with lower views are more likely to have high levels of personal meaning for the people who watch them. Niche content can create incredibly powerful associations when it resonates with viewers, as several of our respondents attest from their own experience. The value of content with broad appeal is well understood, but our data suggests specialist or more niche content with lower view counts (sometimes referred to as the "long tail") can spark stronger emotional reactions and, crucially, is one of the things people value most about these platforms.

Videos with lower view counts were more likely to have high levels of personal meaning

% videos with "high" personal meaning, by views of video²⁷

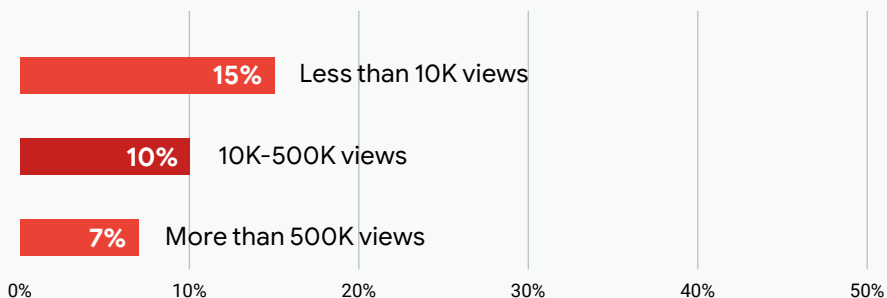


FIGURE 14

I DON'T USE ANY OTHER PLATFORM THE WAY I USE YOUTUBE

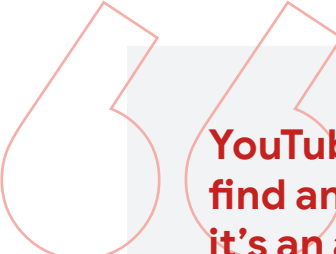


YOUTUBE USER: Huda, 21, Hertfordshire

Huda from Dubai is a student living in the U.K. During COVID-19 she couldn't go home to be with her family for Ramadan. Her dad records himself recreating meals back home in Dubai and posts them on YouTube so that Huda can follow along — to stay connected with her heritage and feel more “at home” while away from home. These videos have single-digit view counts — but the significance is in the eye of the beholder. For Huda these videos have deep personal meaning, from family connection to developing new cooking skills and exploring her cultural heritage and faith. [28](#)

“I watch these videos to inspire me in the future, and they also give me ideas on recipes I'd like to try out. I'm from the Middle East so I watch a lot of Middle Eastern cooking videos, or ask my parents. **Because I can't go home right now it feels really nice to be able to make these dishes here.** It also feels nice because it reminds me of the dishes of my childhood and what my mum and dad would cook me all the time ... I really wanted to make this recipe [molokhia]. I sent my dad a message, and he made this YouTube video for me ... YouTube is my main platform for videos. **I don't use any other platform the way I use YouTube.**”






YouTube is a place where you can find anything and everything ... it's an archive of amazing and rare things such as concerts and performances you can't see anywhere else.²⁹

MELISSA 45-54, WOMAN, WHITE, LONDON

I probably use YouTube the most because it has such a large range of content about the things I'm interested in, whether that's learning about science, making money, coding, the economy, or environmental issues ... YouTube has it all.



JONATHAN 25-34, MAN, VISUAL DISABILITY, EAST MIDLANDS

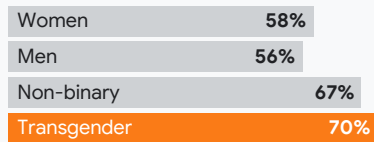
Represent who I am

Some protected groups see themselves particularly well reflected in the content available on YouTube (figure 15). But, as we've discussed, identity isn't just about a checklist of protected characteristics — it's also about the passions and values we claim for ourselves. Seventy percent of people say they expect to still be able to find relevant content on YouTube, no matter how much their life, values, or interests change. YouTube also performs particularly strongly when it comes to learning, with more respondents saying it helps them find out about new topics than any other platform (75%, compared to an average of 60% across other platforms).³⁰ Seventy-six percent of people say that YouTube helps them learn new skills and knowledge, and 73% say that it expands their horizons.

Some audiences report higher levels of seeing themselves reflected in the content on YouTube

YouTube content includes people who reflect me, my identity, and my culture

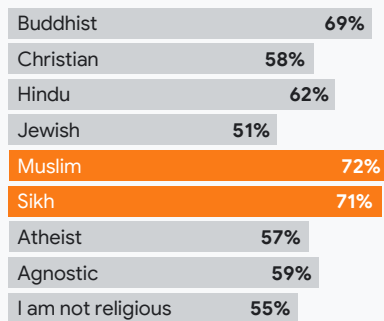
Gender



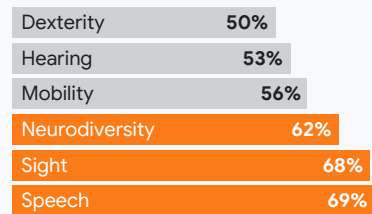
Ethnicity



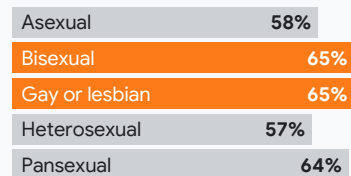
Religion



Disability



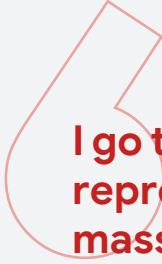

Sexuality



Significantly **higher** than the general population

FIGURE 15

Sample of sub-audience results reflecting agreement to YouTube content "includes people who reflect me, my identity, and my culture"





I go to YouTube to feel represented. There is such a massive variety of content and because it's so easy to post your own content, it has so many users. I don't think there is anyone who wouldn't feel represented on YouTube ... There was a video about Ghanian funerals and the man had the same surname as me — we could be related.

SAMUEL

65-74, MAN, BLACK, LANCASHIRE

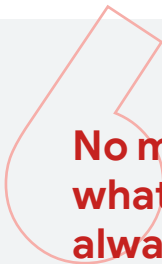

I like watching Riss & Quan because Riss is part Jamaican and part Italian, which is a similar mix to me, and she's going through a pregnancy at the moment and I'm pregnant ... it makes me feel happy and represented.



KIARA

18-24, WOMAN, MIXED ETHNICITY, LONDON

YouTube's ability to provide ongoing inspiration and education sets it apart in our study, suggesting that the platform has the potential to be a long-term presence in its users' lives. Overall, two-thirds of respondents anticipate they will still be using YouTube in 10 years' time — a significantly higher proportion than for any other platform in our study. This figure is even more pronounced among certain audiences, rising to 74% for 18-24-year-olds, and 79% for those identifying as non-binary.



No matter who I am, no matter what time or place, YouTube always has something I can relate to ... whether that's finding school videos as I'm currently studying, or pregnancy workout videos ... or how to get people to use my pronouns — it all relates to me in different moments.

BAILEY

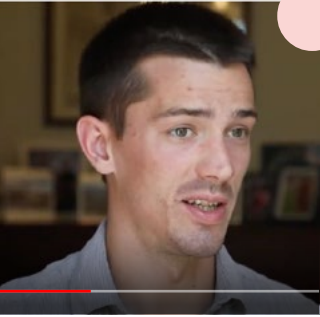
18-24, NON-BINARY, BISEXUAL, MIXED ETHNICITY, WEST MIDLANDS

I'm into bodybuilding — videos about the competitions coming up, getting tips from them about diets, exercises ... It's exclusively YouTube, there's so much there to access.

JAMES

25-34, MAN, BLACK, NORTH WEST





“INCREDIBLE PLACE TO DIG OUT NEW INFORMATION, SEE NEW THINGS”

YOUTUBE USER: Sam, 31, Wakefield


Sam has been a keen gardener for some time, but a back injury meant he had to find a new outlet for his interest. He used YouTube to learn how to tend bonsai trees, and learn more about practising martial arts to improve his mobility and deal with back pain.³¹

“I was bedridden for a few months and spent a lot of time watching videos on my phone. **YouTube is great for keeping me entertained, and also learning new things** when I didn’t have the ability to get out and about. Mostly at the minute I’m watching YouTube videos on bonsai how-tos and martial arts ... for inspiration, dedication to their craft, a lifetime of practice. **[YouTube is an] incredible place to dig out new information, see new things, learn about new cultures and experiences, topics — things you wouldn’t normally get to see — all condensed in one place.**”



Nurture respectful community

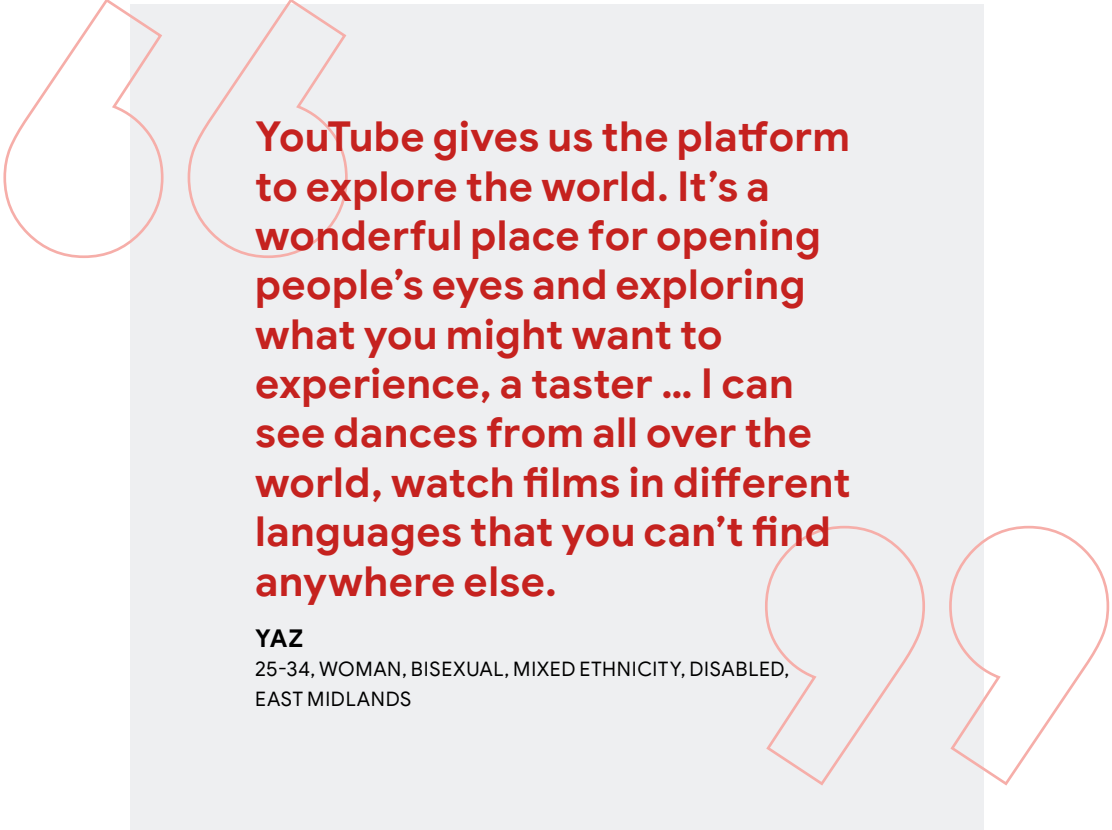
Empathy is an important aspect of nurturing respectful community — and the media plays an essential role as a window into the experiences of others. We see this in the way people use YouTube, with 67% of respondents agreeing that it helps them understand other people’s differing life experiences or perspectives, while 64% say it helps them to consider different perspectives and views on a given topic.³²



A friend’s daughter just told her she was bisexual and I wanted to understand more about what she might feel and difficulties she might face, so I’ve been watching Things LGBTQ+ People Wish Their Parents Knew.

EMILY

35-44, WOMAN, WHITE, NORTH EAST



YouTube gives us the platform to explore the world. It's a wonderful place for opening people's eyes and exploring what you might want to experience, a taster ... I can see dances from all over the world, watch films in different languages that you can't find anywhere else.

YAZ

25-34, WOMAN, BISEXUAL, MIXED ETHNICITY, DISABLED,
EAST MIDLANDS

We noted in the previous chapter that more frequent users of media services are more likely to feel that those services help them experience empathy and community than less frequent users. For YouTube, this effect is even more pronounced, especially if we look at daily users, where positive responses were between 11-12 percentage points higher on these topics. Specifically, YouTube users are significantly more likely to say the platform helps them feel a sense of community with other users, better able to understand the needs of friends, partners, or family, and able to consider alternative perspectives (figure 16).

Daily YouTube users are significantly more likely to feel a sense of community with other users

Agreement with statements amongst YouTube users

Be able to consider alternative perspectives



Feel a sense of community with each other



Feel understood




Be able to understand needs of friends, partners, or family



Monthly YouTube users

Daily YouTube users

FIGURE 16



The feeling of being with a group of people who appreciate the same thing and have the same mind, it's a wonderful feeling, like a universe and connectedness in a bigger way."


PARISA

65-74, WOMAN, MIXED ETHNICITY, DISABLED, LONDON,
BORN IN TANZANIA

[Watching and dancing to flamenco] I feel part of my Spanish community, a sense of belonging, uplifted and happy! It's an art I can relate to from times in my life, it comes from the soul, it stirs me up and reaches out to me.

ANGÉLICA

55-64, WOMAN, MIXED ETHNICITY, LONDON

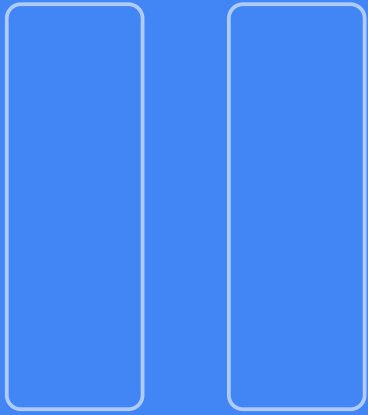




When I watch Lilly Singh I feel a part of a community. It's so accurate, I can imagine my grandparents saying that or being in the same situation — I feel closer to her than other creators because I can relate to her experiences.

ANYA

25-34, WOMAN, ASIAN, SOUTH




The U.K.'s media
and advertising
industries are
focused on DEI



The U.K.'s media and advertising industries are focused on DEI

As part of our research, we interviewed several large U.K. advertisers and media agencies³⁹ to understand how they engage with issues of diversity and representation, and how they see things developing in the future.


Recognising the groundswell of feeling among their audiences, everybody we spoke to – from various parts of the media sector – agreed on the need to reflect evolving social values and said advertisers have a responsibility to improve representation. We heard distinct ideas and worries about the best way to move forward, although any differences of opinion tended to relate to the rate of progress rather than the overall direction of travel.



Almost every one of our clients has been through a transformative 18 months. We've seen such societal change.

CREATIVE AGENCY

A number of themes emerged from these conversations. The core areas of representation being discussed by the media sector tended to centre on gender, ethnicity, and sexual orientation. Creative agencies are seen to have made more progress in addressing issues of diversity, equity, and inclusion – some people we interviewed thought this could be because of the greater visibility, and in turn scrutiny, of on-screen representation. Some also spoke about a lack of consideration for other dimensions of identity, including socio-economic diversity, people with disabilities, and religion. Others suggested greater consideration could be given to the important role that shared values play in identity and media choices. Many were fearful of taking a simplistic approach to representation and relying upon reductive stereotypes.



Shared values can be more important than just demographics. A 16-year-old and a 60-year-old can find common ground with content they consume.

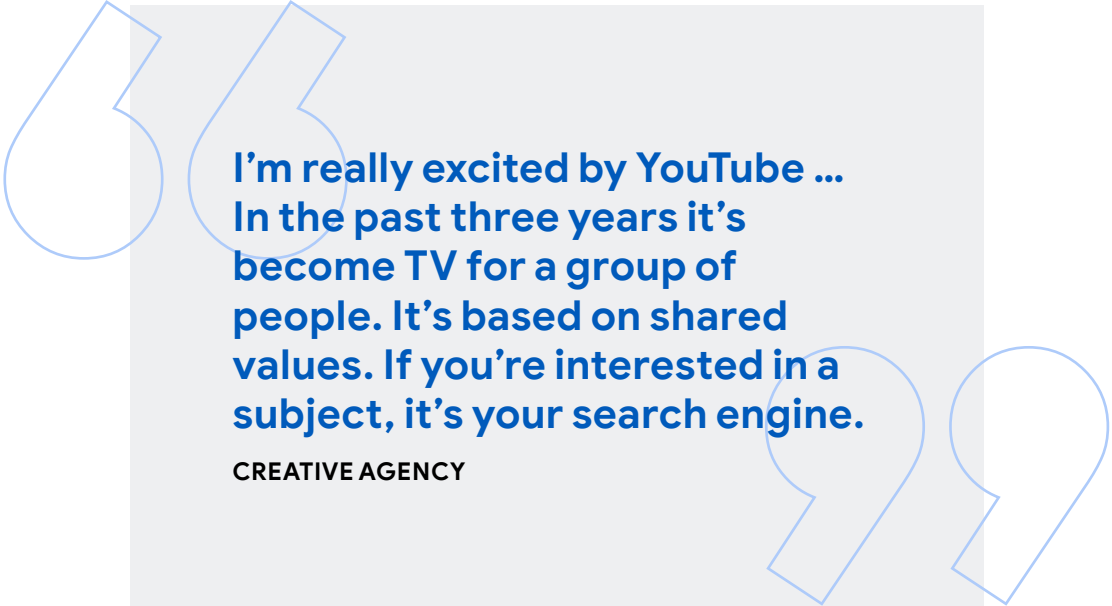
CREATIVE AGENCY

The need for cultural fluency — described by advertisers as familiarity with various cultures and the ability to communicate effectively in different contexts — was another recurring topic in these conversations. Many recognised that advertisers and brand owners that are culturally fluent gain a competitive advantage from access to a more diverse range of talent, ideas, and audiences. Advertisers and agencies told us they see open platforms such as Instagram, TikTok, Twitch, and YouTube as important democratising forces that remove barriers to content creation, ensuring more authentic diversity behind the camera. With its breadth and depth of content and searchability, YouTube in particular is recognised for connecting all audiences with personally relevant content.



**YouTube is more reflective
of modern Britain because
it's made by people from
modern Britain.**

CREATIVE AGENCY



**I'm really excited by YouTube ...
In the past three years it's
become TV for a group of
people. It's based on shared
values. If you're interested in a
subject, it's your search engine.**

CREATIVE AGENCY

Businesses are increasingly aware of the benefits of a strong diversity, equity, and inclusion agenda. For example, McKinsey reports that the top quartile of companies judged by levels of ethnic and cultural diversity outperformed the profitability of the bottom quartile by 36%.³⁴ Our data shows that the British public are also concerned about issues of inequality and discrimination on the basis of protected characteristics. In certain consumer categories, levels of concern are even higher. For example, nine out of 10 people interested in beauty, fashion, fitness, health, and wellness say they are concerned about inequality and discrimination (figure 17).


More than 9 out of 10 people interested in beauty are concerned about inequality and discrimination³⁵

Concern over discrimination on the basis of protected characteristics among those interested in a range of consumer categories

Beauty	92%
Fashion	92%
Fitness, health, and wellness	90%
Shopping	88%
Music	88%
Gaming	88%
Food, drink, and cooking	87%
Home and garden	87%
Film	87%
Technology	87%
Nature/outdoors	86%
Travel	85%

FIGURE 17

From our conversations with advertisers it's clear that many brands are under pressure to contribute meaningfully towards creating and maintaining a more inclusive media landscape. However, like the population at large, there is also palpable anxiety over the consequences of getting it wrong. For example, according to a report by GLAAD, 61% of advertisers are fearful of public backlash by misrepresenting LGBTQ+ people in advertising.³⁶



**To date the focus here has
been internal — we have to be
confident in ourselves about
how we think and act, then
we can talk with people about
these things, in the right way.**

BRAND

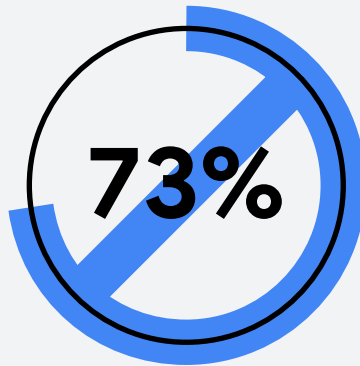


Why media matters in this moment

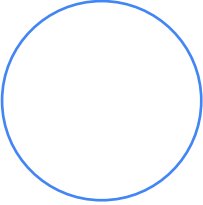


Why media matters in this moment

According to population estimates by the Office for National Statistics, 84.8% of the U.K. population are of white ethnicity, dropping to 59.2% in London.³⁷ It's projected that in less than five years' time, more than one in five Britons will be from a Black, Asian, or minority ethnic background.³⁸ At the industry level there are a number of significant initiatives to improve diversity and measure change, including ISBA's quarterly Diversity and Inclusion Tracker, and Ofcom's Diversity and Equal Opportunities in TV and Radio report. These and other efforts have led to a growing and valuable body of work, particularly on representation in creative (both produced and advertising) content.

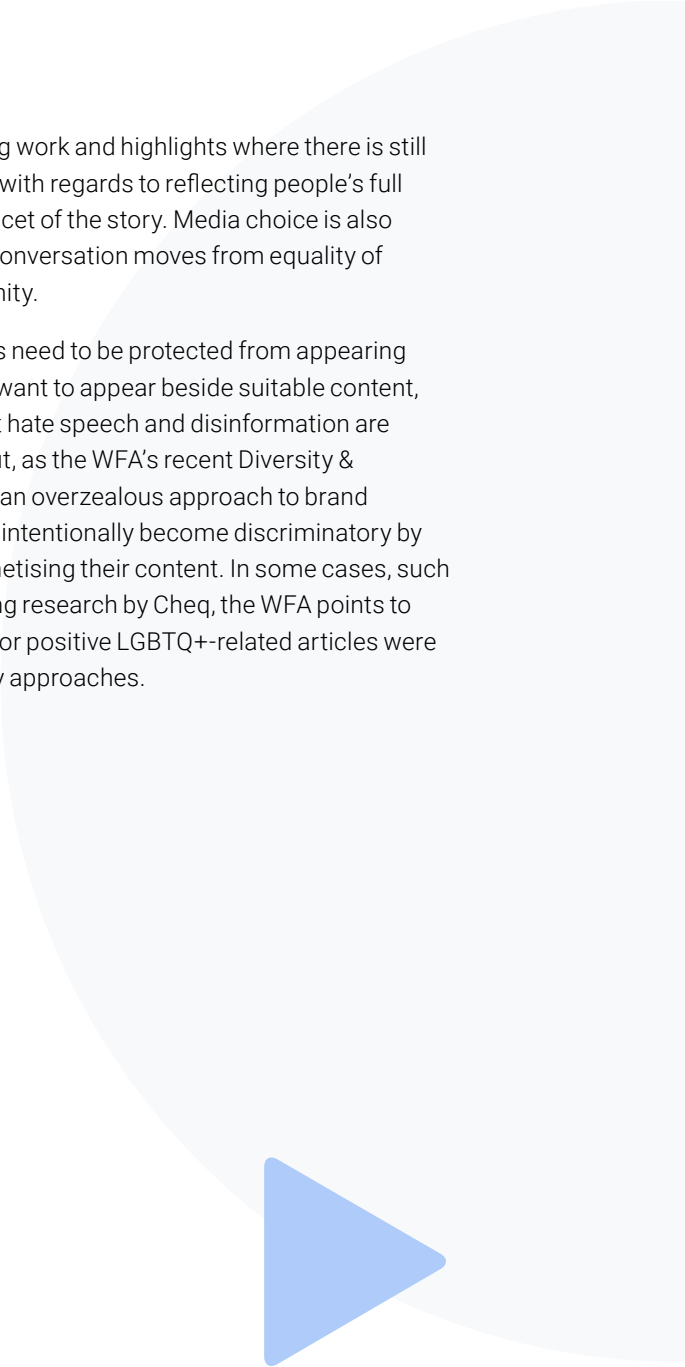


73% of neutral or positive LGBTQ+-related articles were being blocked by some brand safety approaches³⁹



Our research aligns with this existing work and highlights where there is still room for improvement, particularly with regards to reflecting people's full identities. But creative is only one facet of the story. Media choice is also vitally important, especially as the conversation moves from equality of representation to equity of opportunity.

The industry recognises that brands need to be protected from appearing alongside harmful content. Brands want to appear beside suitable content, while everyone wants to ensure that hate speech and disinformation are not being inadvertently funded.⁴⁰ But, as the WFA's recent Diversity & Representation report makes plain, an overzealous approach to brand safety and keyword blocking can unintentionally become discriminatory by preventing diverse voices from monetising their content. In some cases, such caution may be unnecessary.⁴¹ Citing research by Cheq, the WFA points to an example in which 73% of neutral or positive LGBTQ+-related articles were being blocked by some brand safety approaches.





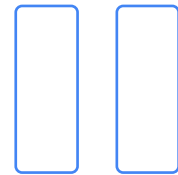
Content is often funded by the advertising that supports it, and advertisers' money can have a considerable impact on what does or doesn't get funded. Many of the more progressive and inclusive TV shows in recent years have only been made possible by the support of advertisers around them.⁴²

WFA

Navigating audience needs and expectations is challenging. Culture is constantly shifting, changing how previously accepted language and modes of representation are received. People expect brands to earn the right to associate with diverse issues and not just pay lip service to them. There are numerous examples from recent years where advertisers have unsuccessfully tried to align with a prominent social movement. While many of these attempts were no doubt made with the best intentions, accusations of bandwagon-jumping, greenwashing, or just plain ignorance abound. The threat of cancel culture, which open platforms have played a role in enabling,⁴³ can contribute to a sense of caution, even inertia.

Our analysis also points to a number of areas where discourse around identity is evolving.⁴⁴ Viewers will continue to challenge the U.K. media industry to better understand them as multifaceted individuals, to provide genuinely collaborative action in support of campaigns they seek to leverage, and to effectively “pass the mic” so that traditionally excluded people have a voice⁴⁵ (especially if brands want to benefit from their cultural fluency). This sentiment was reiterated during consultations with experts in the field.

With a large population of diverse creators already producing engaging, authentic content on a vast range of topics, brands that are prepared to engage thoughtfully with this creative community and share the spotlight will be better positioned to navigate shifting expectations, maintain their relevance, and support a more representative and equitable creative economy.





Brighter
mirrors,
clearer
windows

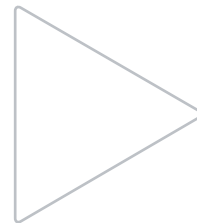


Brighter mirrors, clearer windows

Viewers want to see their identities, passions, and values reflected in the content they watch, and are increasingly aware of their power to call out media outlets that fall short.

At the same time, lower barriers to entry have made media creation more accessible to a wider range of people. A new generation of creators has been empowered to share their ingenuity and heart, producing content across an unprecedented number of subjects. This has all contributed to a significant increase in the diversity of available content, and an economic impact measured in tens of thousands of jobs and £1.4 billion added to the U.K. GDP from YouTube alone in 2021.⁴⁶

Throughout this report we identify anxiety as a common thread connecting almost every participant in our research, from viewers to creators to brands and other media professionals. This isn't surprising, as much of our data illustrates the complex emotional nuances underpinning questions about identity and media choice.



What it also hopefully demonstrates is that the diversity and complexity of the U.K.'s media ecosystem is one of its great strengths. To help you make the most of this opportunity, we'll end by summarising a few implications for brands:

- **To reach an audience fully representative of the U.K., meet your audiences where they feel they can see and be themselves.** Open platforms play an important role for U.K. audiences who see their screens as both a mirror and a window to the many facets of modern identity. Our analysis of love and trust in media shows that people want access to content in which they can see themselves reflected, and which exposes them to the lives and experiences of others. Remember, “niche” is in the eye of the beholder. On YouTube at least, the key moments of emotional engagement for audiences aren't necessarily those with the highest ratings.
- **Continue to invest in improving cultural fluency.** Many people in the U.K. — irrespective of their identities — feel anxious about the issues discussed in this report and about getting things wrong. At the same time, the audiences we spoke to also recognised the vital importance of getting things right, and in taking steps towards improving. If you're not sure how to proceed, our [Inclusive Marketing site](#) is a good place to start.
- **Beware unintended consequences.** Passionate, highly engaged audiences are out there, but you can miss them. If keyword and topic blocklists aren't thoughtfully managed, they can limit your ability to reach a fully representative U.K. audience and disproportionately affect diverse creators. If you would like to review your approach to keyword exclusions, the WFA and Conscious Advertising Network offer constructive resources to help you get started.

Authors

Sarah Ashley, Research Manager, Ads Insights team, EMEA, Google
Jonny Protheroe, Head of Google's Ads Insights team, EMEA, Google

Acknowledgements

This work was influenced by many, and we thank them for their advice, support, and contributions.

From Google:

Rebecca MacDonald, Will Whalley, Patrice Harvey, Tom Sherwood, Maura Moss, Sharvi Mehta, Jo Ogunleye, Gerald Breatnach, Hamish Priest, Rajarshi Guha Khasnabis, Lucy Sinclair, Hayeon Kim, Mark Sturgess, Nishma Robb, Bob Rushing

From outside Google:

Caroline Wren, James Bryson, Morgan Burgess, Samira Guerra, Faiza Bano, Georgie Rowe, Richard Ellis, Youssef Zitoun from MTM

The team at Redwood BBDO

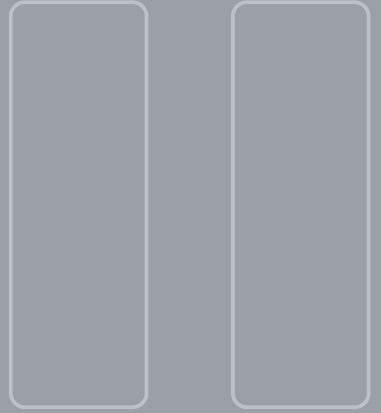
Philip Walford

Tanner Davis, Fayez Ahmed





Appendix



The research

MTM worked with Google to deliver a deep understanding of identity and media usage in the U.K. today through an extensive research programme.

1: Multidisciplinary scoping phase

Media buyer consultations

Eleven interviews with buyers at advertisers and agencies to understand perceptions towards diversity in media, its influence on media-buying, and the degree to which media owners are meeting their needs. Interviews conducted by MTM in March and April 2021.

Literature review and expert interviews

MTM conducted an extensive literature review and interviewed four experts (academic and marketing professionals) on the topics of diversity, equity, and inclusion, in the U.K. and media today, to deepen knowledge of, and identify trends in, how diversity is perceived and understood in Britain today.

Cultural analysis

MTM partnered with cultural analysis and semiotics specialist Sign Salad to understand the more subconscious and cultural context that shapes understanding and expression of identity and diversity in the U.K. Using their Culture X AI platform they audited a range of touchpoints across media, including: social media (for example, Instagram, Facebook, TikTok, Clubhouse), video and audio-hosting platforms (for example, Twitch, TikTok, YouTube, Vimeo, Spotify), print media, news, and pop culture.

2: Deep consumer immersion

Media task and in-depth interviews

Twelve people participated in a media diary task for two weeks, logging and reflecting on the media content they naturally engaged with across the research period (various media in scope, including but not exclusive to use of YouTube), with an increasing focus on content that felt relevant and

representative of who they are (in other words, connected with their sense of identity) or expanded their understanding of others. The 12 participants each then took part in a two-hour interview to explore the relationship between identity and media in more detail. Interviews were paired so that respondents could (if they chose) be discursive not just with MTM, but also with a trusted friend and/or partner. This helped create a safe and familiar space to discuss the topic of identity, being conscious this can intersect with potentially sensitive areas such as diversity, equity, and inclusion, including experiences of discrimination.

3: Large-scale validation

Highly representative survey

An online survey conducted in 2021 with 10,238 participants aged 18+ across the U.K. Nationally representative of the U.K. online population. We sought to reflect the diversity of the U.K. across demographics, attitudes, worldviews, lifestyles, and values. Robust comparisons across 10 media brands (TV, SVOD, social). Participants were allocated to answer for a maximum of three brands with eligibility based on a minimum of monthly usage. The survey was written with the objective to ensure inclusiveness and accessibility for a wide range of people (including people who use screen readers to navigate, people identifying as neurodiverse, and people whose first language is not English, with the survey offering a Welsh language option).

Inclusive research accessibility boost

An online survey conducted in 2021 with 329 participants aged 18+. Conducted in partnership with specialist accessibility and research inclusion consultancy [Open Inclusion](#) to ensure we encompassed the views of people with different accessibility needs that are less likely to be represented on traditional research panels. Using the survey described above as the base of the questionnaire, we carried across the accessibility considerations plus questionnaire adaptations to improve usability further.

This exploration into identity and media in the U.K. was built upon our earlier work with Revealing Reality, looking into the emotional connection between YouTube users and content.

4. Personal meanings

Personal meaning of YouTube – immersion

Thirty-two in-depth user engagements conducted in 2020 that put YouTube viewing under the microscope. Participants took part in a five-day video-watching diary exercise followed by two interviews into their life and YouTube's role in it. With their consent, we collected video history from each participant, which Revealing Reality analysed and coded systematically (over 1,000 videos) to reveal a pattern of personal relevance of content.

Personal meaning of YouTube – validation

An online survey conducted in 2020 with 2,793 participants that reliably connected people's YouTube viewing history to a micro-survey about the personal relevance of the content.

5: YouGov Creative Britain

Media representation survey

An online survey conducted with YouGov in 2021 exploring the need for fairer representation in the media and access to the creative industries, for all people in the U.K. – regardless of their location or background.

This report outlines a synthesis of the findings, combining analyses from all these studies/phases. You can find more methodological detail of each study in the appendix.

Qualitative survey method note

Deep consumer immersion: Media task and in-depth interviews

The qualitative sample was designed to be as inclusive as possible – to allow for a diverse range of perspectives and behaviours, including a mix of gender identifications, ages (18-73), ethnicities, sexual orientation, class (social grade), location (rural/cities, England and Scotland), people living with disabilities (physical, sensory, and mental), and political views (range of political views and attitudes towards “political correctness”). While we sought to connect with a range of voices, it was important to engage with each participant as an individual in the full complexity of their identity, however that was

expressed. We never assigned any criteria (allowing people always to self-describe their identification) and recognised the complexity and intersectional nature of identity. Each respondent was recruited to be themselves and the two-week media diary was crucial both to understand their media habits and engagement with the content, and to build rapport so that MTM could conduct the interviews with as much trust, depth, and nuance as we could within the parameters of the research.

Quantitative survey method note

Large-scale validation

Highly representative survey

Fieldwork quotas were set on gender, age, socio-economic grade, region, and disability in line with ONS and similarly reputable sources. The large sample size and rigorous fieldwork management ensured that there were robust subgroups for analysis of various protected audience groups and the users of various media services.

Questions on brand level were asked to monthly users of the brand. An allocation system assigned respondents to answer for up to three brands of which they were monthly users. YouTube plus 9 additional brands across social media, SVOD, and TV were featured in the survey (Instagram, Facebook, Twitter, TikTok, Netflix, Amazon Prime Video, BBC, ITV, Channel 4). The allocation system worked on a randomised basis to ensure no bias was introduced through the sampling. Throughout the fieldwork, we cross-checked the brand allocation data against data from IPA Touchpoints to ensure we were sampling representative profiles for the users of each media service.

Upon fieldwork completion, the data was weighted on overall level and on brand level. On an overall level, weighting was applied based on Ofcom's Adults' Media Use and Attitudes report 2020/21 data for internet users (on age, gender, region, socio-economic group, and disability).

Accessibility of main survey

- **Disclaimers:** Since our survey included questions about sensitive topics such as sexual orientation or income, the survey featured notes that asked respondents for their consent and reassured them about confidentiality and the purposes of data collection.

- **Scale for questions:** A seven-point agreement scale was chosen to achieve more granularity in responses compared to a five-point scale and less cognitive strain compared to a 10-point scale. Each point on the scale was labelled (completely/ strongly/ slightly/ neither agree nor disagree) and a “don’t know” option was provided.
- **Survey design:** Accessibility functionalities were implemented in accordance with the Web Content Accessibility Guidelines.
 - Showed scale questions as drop downs as opposed to carousels or sliders
 - Ensured colour contrast requirement
 - Increased font size and spacing
 - Provided zoom functionality without text spill
 - Labelled all buttons with relevant words (for example, next button was labelled “Next” instead of “>>”)
- **Language:** Questions and answer options were written in everyday language. Where more technical words were introduced, they were accompanied by a definition (for example, “media services”: By media services we mean any services where you can watch videos, films, or programmes. It can be online services like Netflix or YouTube, or more traditional services like TV). In addition to the English survey, a Welsh translation option was provided, in line with best practice in U.K. social research.

Significance testing: at 95% confidence level (n=10K is accurate to within + or - 1% at the 95% confidence level).

Inclusive research accessibility boost

A research partner specialising in inclusion in research supported us in running a second survey to specifically capture the views of people with disabilities and others who are not usually represented in mainstream research due to accessibility constraints. These participants were recruited from the specialist vendor’s own panel. The accessibility considerations of the main survey were carried over into this version. Additionally:

- **Questionnaire adaptations:** The main survey was reviewed with the accessibility partner and adapted to take into account the access needs of its panel members. Adaptations included:
 - **Length:** Questions and statements were removed to bring down the length of the questionnaire; the allocation system assigned respondents only one or two brands (instead of three brands as in the main survey).
 - **Scales:** Introduced a shorter scale (from a seven-point to a five-point agreement scale).
 - **Question format:** Matrix questions were removed. Scale questions were adapted so respondents would either answer about one statement at a time or statements of a question were adapted into an “agree” multicode question.
 - **Wording:** Question text and instructions were reviewed and adapted, additional guidance was added.
- **Scripting considerations:** The survey was scripted in a way that allowed respondents to skip questions (in line with best practice in surveys with this community). Only a handful of questions were mandatory (age, gender, region, frequency of media use). Respondents were allowed to take breaks and continue the survey where they left off at a later point. Signposting on progress was provided to help with planning of energy levels.
- **Implications for interpreting the results among this audience:** The adaptation of the question format during the questionnaire design phase means that there are a few points to consider when analysing the accessibility survey data. The data of the two surveys can't be compared like for like and the differences are not fully explained by different perceptions, but also partially due to design.

- Use of subgroups:

Base sizes (n=): total respondents that identified as subgroup

Age	Gender		Sexual orientation	Ethnicity	Disability	Socio-economic grade		Region
	Women	Men						
18-34	3,768	5,245	Asexual	Asian	Any disability	AB	2,917	Scotland, Northern England & NI
35-54	3,908	4,953	Bisexual	Black	Dexterity	C1	2,715	Midlands & Wales
55+	2,602	80	Gay/lesbian	Mixed/multiple ethnic	Hearing	C2	1,951	Southern England
		146	Pansexual	White	Mobility	DE	2,965	
			Straight		Neuro-diversity		2,037	
					Sight		461	
					Speech		155	

	Base sizes (n=): monthly users of each brand that were allocated this brand to discuss in detail during the survey	
	Modern Britain survey from online access panel (total n=10,278)	Inclusive research accessibility boost survey (n=329) [netted in analysis by media type to provide more confidence in base size]
YouTube	6,984	146
TikTok	2,265	25
Instagram	3,099	40
Twitter	2,509	41
Facebook	3,028	62
Netflix	3,402	76
Amazon Prime Video	1,115	9
BBC	2,577	80
Channel 4	2,577	77
ITV	2,564	67

Factor and key driver analysis

Almost 100 attributes were included in our quantitative survey as potentially playing a role in driving brand equity across the U.K. media services included before the research. We therefore leveraged advanced analytics to:

- **Make the data digestible:** Factor analysis identified themes in the data and rationalised statements that measure the same idea.
- **Make the data actionable:** Key drivers analysis (stepwise regression analysis) helped with understanding of which themes drive engagement among users.

Factor analysis: is a way to take a mass of data and shrink it to a smaller data set that is more manageable and more understandable. It's a way to find hidden patterns, show how those patterns overlap, and show what characteristics are seen in multiple patterns. It is widely recognised as a useful tool for complex sets of data involving psychological studies, socioeconomic status, and other involved concepts; which made it helpful for rationalising our brand equity data and distilling our quantitative data in a way that aligns with the key messages uncovered in qualitative research. The resulting “factors” were a set of observed variables that have similar response patterns; they are associated with a hidden variable (called a confounding variable) that isn't directly measured.

Key driver analysis: is a method of identifying which variables have impact on a topic of interest. We used a technique called relative weight regression modelling, designed to deal with data multicollinearity (which means data points that essentially overlap and measure the same thing). The key messages and supporting dimensions that have a significant and positive impact on driving brand engagement, and therefore those for media brands to prioritise.

Emotional engagement: “love and trust” — our dependent variable was a composite variable of emotional engagement with a media brand (emotional engagement defined as a composite of survey ratings from the questions: I would recommend, a brand I trust, a brand I love, a brand which shares my values, a brand which cares). Market level average results across brands included in the study, n = 20,573 cases.

SOURCES

- 1 For example, to name only a very select few from an important and growing collection, ISBA's quarterly Diversity and Inclusion Tracker, Ofcom's Diversity and Equal Opportunities in TV and Radio Report, BBC Creative Diversity Report, various works by the Geena Davis Institute, McKinsey's Black representation in film and TV, WFA's Guide to potential areas for bias in the creative process, Advertising Association's All In work and plan.
- 2 We conducted a multi-phase programme spanning 2021, encompassing literature review, semiotics, expert consultations, qualitative media engagements and interviews, a nationally representative survey of 10,278 online adults aged 18+ (including Welsh translation), and a further survey partnering with research inclusion specialists to reach audiences underrepresented on research panels. You can read more about our approach to method, representativity and inclusion in the appendix [here](#). Because we were interested in the views of a range of media services, including many that are online only services, we did not include an offline audience.
- 3 Qualifying criteria – respondents were all monthly active users of at least one brand in the test. Where questions related to specific brands, respondents answered only for those they use at least monthly. You can read more about sampling, allocation, and methodology in the appendix.
- 4 We selected these brands to focus on audio-visual media, moving image, and digital platforms. At the time of fieldwork (during COVID-19 pandemic) OOH/cinema was less appropriate. While other brands would have been ideal to include, we prioritised the respondent experience and data quality, keeping the survey length at 15 minutes. Lastly, it was very important to reach meaningful sample sizes of sub-audiences by each media owner. To do so required a very large sample size and not subdividing it among too many brands. You can read more on approach in the appendix.
- 5 For example: WFA, Diversity & Representation: Guide to potential areas for bias in the creative process, Cheq & University of Baltimore's: The Economic Cost of Keyword Blacklists for online publishers, "Conscious Advertising Network Manifesto.
- 6 Google/MTM, Mirrors & Windows study, 2021, n=10,278 nationally representative of online adults in the U.K., aged 18+. (Survey in field: July-August 2021.) Verbatim responses to "words that represent who you are". Unless stated otherwise, all data in this report is from this study. You can find additional context around method and sample sizes for subgroups and each brand in the appendix.
- 7 Names pseudonymised throughout, except where explicit approvals agreed. Quotes (unless otherwise stated) are from MTM's qualitative depth interviews with U.K. media service users. See more information in the appendix on method.
- 8 Ibid. For detailed reference of subgroup sample sizes, see appendix.
- 9 52% (vs. 57% gen pop) of those who feel concerned about inequality and discrimination feel like they can't express themselves properly without being accused of being sexist or racist. Google/MTM, Mirrors & Windows study, 2021, n=10,278 nationally representative of online adults in the U.K., aged 18+. (Survey in field: July-August 2021.) Those concerned about inequality on basis of protected characteristics, n=7,267
- 10 While there is variance, with some audiences feeling better equipped than others, overall this paints a picture of a majority of the British population experiencing discomfort and difficulty expressing themselves on topics of identity and equality. Across many more subgroups we found sentiment ranging from as high as 74% (amongst Conservative voters) to as low as 31% (non-binary gender identification, represented on the chart). Source: MTM, U.K., Mirrors & Windows study, 2021, n=10,278 nationally representative of online adults in the U.K., aged 18+.
- 11 YouTube Internal Data, Global, reverified July 2022.
- 12 You can learn more about YouTube creators across the U.K. [here](#).
- 13 75% agree that YouTube has content that people in the U.K. love. Average positive response across media in test = 69%. Google/MTM, Mirrors & Windows study, 2021, n=10,278 nationally representative of online adults in the U.K., aged 18+. Total users n=6,694. (Survey in field: July-August 2021.)
- 14 Oxford Economics, U.K., 2021.
- 15 There are other attributes where different brands had better performances but we sought here to shine a light on the collective strengths we can acknowledge across the media set.
- 16 You might ask why Netflix is seen to be for "everyone" when it is subscription based. From our conversations with users, contributing factors include the perceived content breadth, which contains something for everyone; the size of its library, password sharing, and relatively low price compared to a pay-TV subscription or newspaper subscription.
- 17 62% agreed that living outside of London can restrict access to working in creative industries such as broadcast television. Source: YouGov Creative Britain study, 2021, n=5,144 nationally representative of online adults in the U.K., aged 18+. Total sample size n=5,144 adults. Fieldwork was undertaken between 22 and 28 July, 2021. The survey was carried out online and the figures were weighted to be representative of all U.K. adults aged 18+.
- 18 Base size: aggregated responses across groupings and all media (n=30,120 responses).
- 19 Open Inclusion is an inclusive research and solutions consultancy. You can read more about Open Inclusion [here](#), and more about our approach to inclusion in the research in our appendix.
- 20 You can read more about about the research approach and considerations regarding methodology and data comparisons in the appendix.
- 21 Google/MTM, U.K., Mirrors & Windows study, 2021, and MTM/Open Inclusion accessibility survey. 20% of U.K. population live with a disability, one-third are "invisible", while the purple pound in the U.K. is worth £265 billion ([source](#): Open Inclusion).
- 22 MTM/Open Inclusion accessibility survey. (Non-mandatory open end question) Is there anything else you'd like to share

- with us relating to how you view the media service(s) you told us about in this section? See appendix for base sizes.
- 23 The respondents on the inclusion panel included people with disabilities and other research access issues that mean they are not typically represented on research panels.
 - 24 See appendix for explanation of our approach to factor analysis and key drivers analysis. Emotional engagement: 'love and trust' defined as a composite of survey ratings from the questions: I would recommend, A brand I trust, A brand I love, A brand which shares my values, A brand which cares). Using average results across brands included in the study, n=20,573 cases.
 - 25 We have used the acronym "LGBQ+" here to denote a netted figure for audiences who self identified as gay, lesbian, bisexual, asexual, pansexual, or other sexual orientation. While this acronym usually includes "T" for the Trans community, here we are specifically referring to sexual orientation. We have included specific trans and LGBTQ+ stories in the report, and use the appropriate acronym or self-identification in those places. Please see appendix for sample sizes among subgroups.
 - 26 Revealing Reality, YouTube Personal Meaning Study, U.K., n=32 YouTube users aged 18+, March-July 2020. Learn more [here](#).
 - 27 [Personal Meanings study, Google Survey, U.K, YouTube users aged 18-54, n=2,793, weighted to be representative of U.K. YouTube users, July 2020.](#)
 - 28 Revealing Reality, YouTube Personal Meaning Study, U.K., n=32 YouTube users aged 18+, March-July 2020. Learn more [here](#).
 - 29 Revealing Reality, YouTube Personal Meaning Study, U.K., n=32 YouTube users aged 18+, March-July 2020.
 - 30 Revealing Reality, YouTube Personal Meaning Study, U.K., n=32 YouTube users aged 18+, March-July 2020.
 - 31 Revealing Reality, YouTube Personal Meaning Study, U.K., n=32 YouTube users aged 18+, March-July 2020.
 - 32 This has interesting parallels with "it's ok to ask" research, which found that 50% of the U.K. population turn to Google and other search engines first to find more information about questions on topics that are not related to their own lived experience, such as sexuality, disability, race, religion, and cultural norms. That same research also revealed that 50% of the nation feel more comfortable asking Google Search questions, than asking people, and that the main reason people in the U.K. are asking questions online is that it allows them to ask "inappropriate/silly" questions (48%), questions they are unsure how to approach (31%) and because they are fearful of being offensive to another person (37%). Source: YouGov, 2021, 1,217 adults.
 - 33 MTM advertiser interviews, n=11 qualitative interviews, conducted between March and April 2021. Mix of agencies (creative and media) and brands, in the U.K., or global with U.K. footprint.
 - 34 Source: McKinsey, 2020
 - 35 Google/MTM, U.K., Mirrors & Windows study, 2021. n=10,278 nationally representative of online adults in the U.K., aged 18+. (Survey in field: July-August 2021.) Base: interested in beauty n=2,458, fashion n=2,319, fitness/wellness/health n=2,912.
 - 36 Source: GLAAD/P&G, 2021, [here](#).
 - 37 Office for National Statistics, Population estimates by ethnic group and religion, England and Wales: 2019, Annual Population Survey, Mid year population estimates, and Census 2011 data; [here](#).
 - 38 "Access all areas: The Diversity manifesto for TV and Beyond" by Lenny Henry and Marcus Ryder, 2021, citing: Philip Rees et al., Ethnic Population Projections for the U.K. and Local Areas, 2011-2061: New Results for the Fourth Demographic Transition, Presentation at the British Society for Population Studies, Annual Conference, Leeds, 7-9 Sept, 2015.
 - 39 [WFA, Diversity & Representation: Focus on media planning and buying, 2022](#); citing: [Cheq and University of Baltimore: The Economic Cost of Keyword Blacklists for Online Publishers, 2019](#).
 - 40 At YouTube over the past several years, we've redoubled our efforts to live up to our responsibility while preserving the power of an open platform. Our work has been organised around four principles: Remove: content that violates our policy as quickly as possible, Raise: authoritative voices when people are looking for breaking news and information, Reward: trusted, eligible creators and artists, and Reduce: the spread of content that brushes right up against our policy line. You can learn more [here](#).
 - 41 In 2021, YouTube became the first digital platform to receive accreditation for content level brand safety from the Media Rating Council (MRC). YouTube's ad placements were accredited by the MRCl as achieving 99% brand safety effectiveness without any further advertiser-specific restrictions being imposed. Learn more [here](#)
 - 42 [WFA, Diversity & Representation: Focus on media planning and buying, 2022](#); citing: [Cheq and University of Baltimore: The Economic Cost of Keyword Blacklists for Online Publishers, 2019](#).
 - 43 The term "cancel culture" refers to the blocking or boycotting of a person or brand, because they've expressed an opinion that is perceived to be offensive. Debate about cancel culture and freedom of speech regularly appear in popular discourse, typically with strong proponents in often polarised directions. While the term has earlier origins, it has been popularised in more recent years, especially as the open nature of social media sites has played a role in giving a louder collective voice to such discussions.
 - 44 To understand the subconscious cultural context of how identity and diversity are expressed in the U.K. and the emerging directions of travel, we conducted a semiotics analysis across a range of media touchpoints, including social media, video- and audio-hosting platforms, print media, news, and pop culture.
 - 45 To "pass the mic" is to consciously provide a platform to underrepresented voices and give them agency/empowerment, recognising when it's someone else's place to speak and uplifting other relevant voices, letting people speak in their own words.
 - 46 Oxford Economics, U.K., 2021.

Think with 