

VISIBILITY PERCEPTIONS IN ADVERTISING

2024

TABLE OF CONTENTS

3	From the Office of the President and CEO, Sarah Kate Ellis
4	A Note on Consumer Engagement
5	Introduction
6	Key Findings
8	The Importance of Featuring LGBTQ People and the Budgets Allocated to Target Us Have Increased Since 2021
12	The Fear of Backlash is More Pronounced this Year
18	Companies that Have Faced Backlash are Even More Committed to LGBTQ Inclusion in Advertising
22	Tools the Industry Needs to be Committed to LGBTQ Inclusion
24	Acknowledgements
25	Methodology
26	Notes

FROM THE OFFICE OF THE PRESIDENT AND CEO, SARAH KATE ELLIS

Our *2024 Visibility Perceptions in Advertising* study updates groundbreaking research from 2021, when GLAAD surveyed 200 decision-makers and marketing executives from advertisers and advertising agencies to understand perceptions, commitments, and challenges to featuring LGBTQ people in advertising.

This year, we found major increases in how industry leaders value and recognize the power of LGBTQ inclusion. Compared to 2021, our *2024 Visibility Perceptions in Advertising* study revealed an +80% increase in the advertising industry agreeing that the LGBTQ community is very important to their business. Our study surveying industry leaders also yielded a better understanding of the importance of transgender representation in advertising, with the industry saying the importance of featuring transgender people has increased by +71%; the importance of bisexual representation in advertising increased by +69%; and the importance of nonbinary representation in advertising increased by +34%.

While GLAAD's research on representation in advertising has found LGBTQ people are underrepresented, our *2024 Visibility Perceptions in Advertising* study revealed that an overwhelming majority of decision-makers and executives in the advertising industry want to include LGBTQ communities in their adverts and campaigns.

As media distribution and consumer behaviors continue to evolve rapidly, consumers have more options than ever before as to how they spend their time and money, especially Gen Z—a generation that is more than 20% LGBTQ. Brands wishing to attract the attention and loyalty of young, diverse consumers must expand their efforts for inclusive storytelling now and remain steadfast if fringe anti-LGBTQ activists respond. Our research found that companies that have faced backlash are up to 1.6x more likely to increase their commitment to feature LGBTQ people than companies that have not.

Our *2024 Visibility Perceptions in Advertising* show that significant work remains to empower brand and agency leaders to not only "get it right" but also to partner with organizations like GLAAD as business partners to meet shared goals.

Now is the time for action and to put years of data to the test to meet this bifurcated cultural moment. One path leads to turning your back on millions of new consumers entering the marketplace and workforce, while the other welcomes growth and new business opportunities.

The question is not if LGBTQ people should be included, but how. Our teams look forward to partnership that places companies on the path of inclusion and success.



In solidarity,

SARAH KATE ELLIS
President & CEO, GLAAD

A handwritten signature in black ink that reads "Sarah Kate Ellis".

A NOTE ON CONSUMER ENGAGEMENT

This report underscores what GLAAD and many researchers have uncovered in the past few years: LGBTQ inclusion is a future-proofing strategy.

Looking exclusively at LGBTQ consumers, brands have to consider the \$1.4 trillion purchasing power of LGBTQ Americans or up to **\$4.7 trillion** if seeking global consumers. Global and U.S. identification in the community is increasing, with Gen Z Americans more likely to be in the community than any other generation.

Gen Z's non-LGBTQ peers in the U.S. are more likely to know an LGBTQ person and support the community than other generations, but overall, research shows that allyship is strong and includes expectations of corporate responsibility across demographics.

GLAAD's Accelerating Acceptance survey of non-LGBTQ Americans found that **a majority of those outside the LGBTQ community believe companies should publicly support us.**

Edelman Trust Institute found **Americans across demographics seek out employers and are more likely to buy or use brands who take a stand in support of LGBTQ rights.**

KANTAR, in partnership with GLAAD's Advertising Visibility Index, **found a majority of Americans feel advertisers have a responsibility to give visibility to LGBTQ people and families.**

A GLAAD and Ipsos poll found **Americans were nearly twice as likely to back companies facing criticism for supporting the LGBTQ community rather than their critics.**

And despite recent anti-DEI backlash, **the majority of brands say their commitments to DEI are staying strong.**

The industry continues to see data from disparate sources prove the need for and value of LGBTQ inclusion, and with this survey it is clear these realities are bringing about an increase in expected brand commitments.



MEGHAN BARTLEY

GLAAD Media Institute,
Senior Director of Agencies, Brands, and Engagement

INTRODUCTION

GLAAD recently fielded a study of decision-makers and senior leaders in the Advertising Industry to understand perceptions, commitments, and feelings about the impact and importance of featuring the LGBTQ community in advertising and uncover new and emerging industry challenges.

This tracking study was first conducted in 2021 as part of the launch of *The Visibility Project* in partnership with P&G, exposing the myths and unveiling new facts about the industry's commitment to LGBTQ inclusion in advertising. *The Visibility Project* started as a campaign to drive and sustain LGBTQ inclusion in advertising and marketing. It has now grown into a full-fledged consultancy, education, and research engine of GLAAD that provides needed tools, resources, and playbooks for more authentic inclusion that drives cultural change. This inaugural study revealed how crucial representation is in driving greater acceptance and understanding of LGBTQ people and issues, and it underlined essential insights that the industry lacks internal knowledge to get representation “right.”

This second wave of the study was conducted to pinpoint changes in sentiment and commitment from the industry compared to the first study. In an environment

of unprecedented anti-LGBTQ legislation combined with a small but loud minority of extremists pushing back against LGBTQ inclusion efforts during Pride month, it was imperative to gauge where the industry is today with inclusion efforts.

In this report, we learn directly from industry leaders how (or even if) advertising budgets targeting the LGBTQ community have changed, whose stories and depictions the industry prioritizes within advertising, and how brands are responding to the backlash and challenges facing the industry today.

The study also identifies why the Advertising industry believes it's important to advocate for the LGBTQ community, along with perceived barriers and risks. Finally, we learn what tools or resources the sector needs to remain committed to this culture-changing work. **GLAAD's research** shows that media exposure drives familiarity and acceptance by double-digits, and advertisers have a responsibility and an opportunity to be part of the change we need to see to increase acceptance of the LGBTQ community.

KEY FINDINGS

Compared to the 2021 survey:

90% of the industry says it's very important to feature the LGBTQ community in advertising

There has been a **+80% increase in the industry** saying the LGBTQ community is very important to their business

69% of advertisers and agencies have funds specifically allocated to targeting our community, **+15% from the prior survey**

The industry is **+55% more likely** to say they don't have the expertise and knowledge to get LGBTQ representation "right"

KEY FINDINGS

Respondents also said:

Nearly half of the industry completely agrees that authenticity in LGBTQ inclusion in advertising is key

Companies that have faced backlash are up to **1.6x more likely to increase their commitment** to feature LGBTQ people compared to companies that have not faced backlash

Partnering with nonprofits to provide guidance is the **#1 thing the industry mentioned** needing to be more committed to this work



**THE IMPORTANCE OF
FEATURING LGBTQ PEOPLE
AND THE BUDGETS ALLOCATED
TO TARGET US HAVE
INCREASED SINCE 2021**

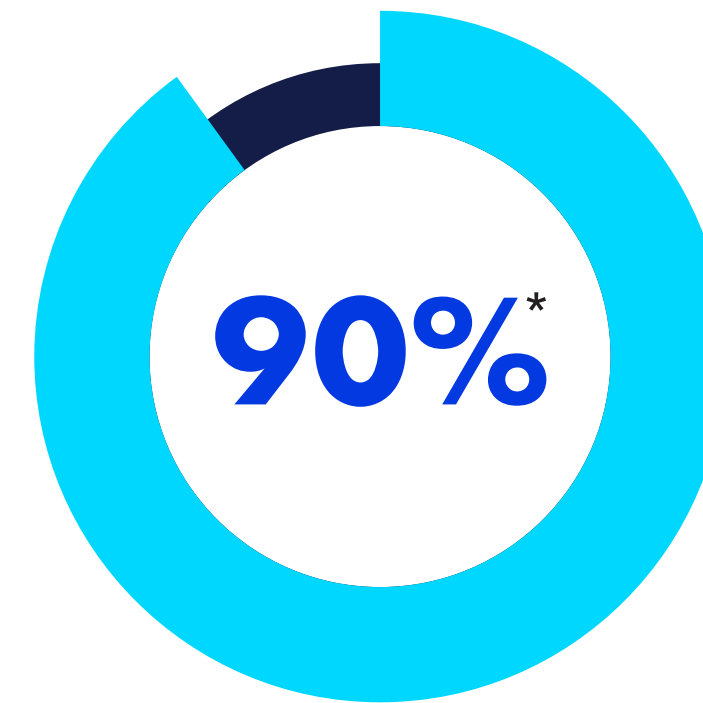
Iparraguirre Recio/Moment via Getty Images

Mascot/DigitalVision via Getty Images



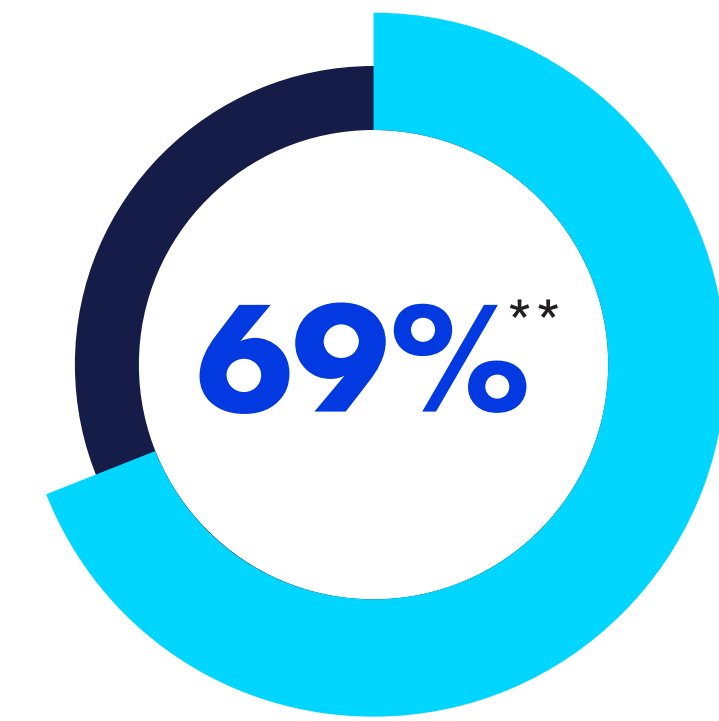
90% of advertisers and agencies agree it's very important to feature LGBTQ people in advertising, up from 84% in 2021. And nearly 70% of advertisers and agencies have funds specifically allocated to target our community, compared to 59% in 2021. With **7.6%** of U.S. adults identifying as LGBTQ in the U.S., 22% of Gen Z adults, and 10% of Millennials, featuring us in advertising and legitimizing LGBTQ consumers is a business growth strategy. The increase in the importance of featuring our community is driven by Advertisers over Agencies (+16% increase among advertisers).

The industry is placing more importance on featuring our community, and allocating more funds to target us



think it's very important to feature LGBTQ people in advertising

84% in 2021



have funds specifically allocated targeting the LGBTQ community

59% in 2021

*statistically significant at 90% confidence

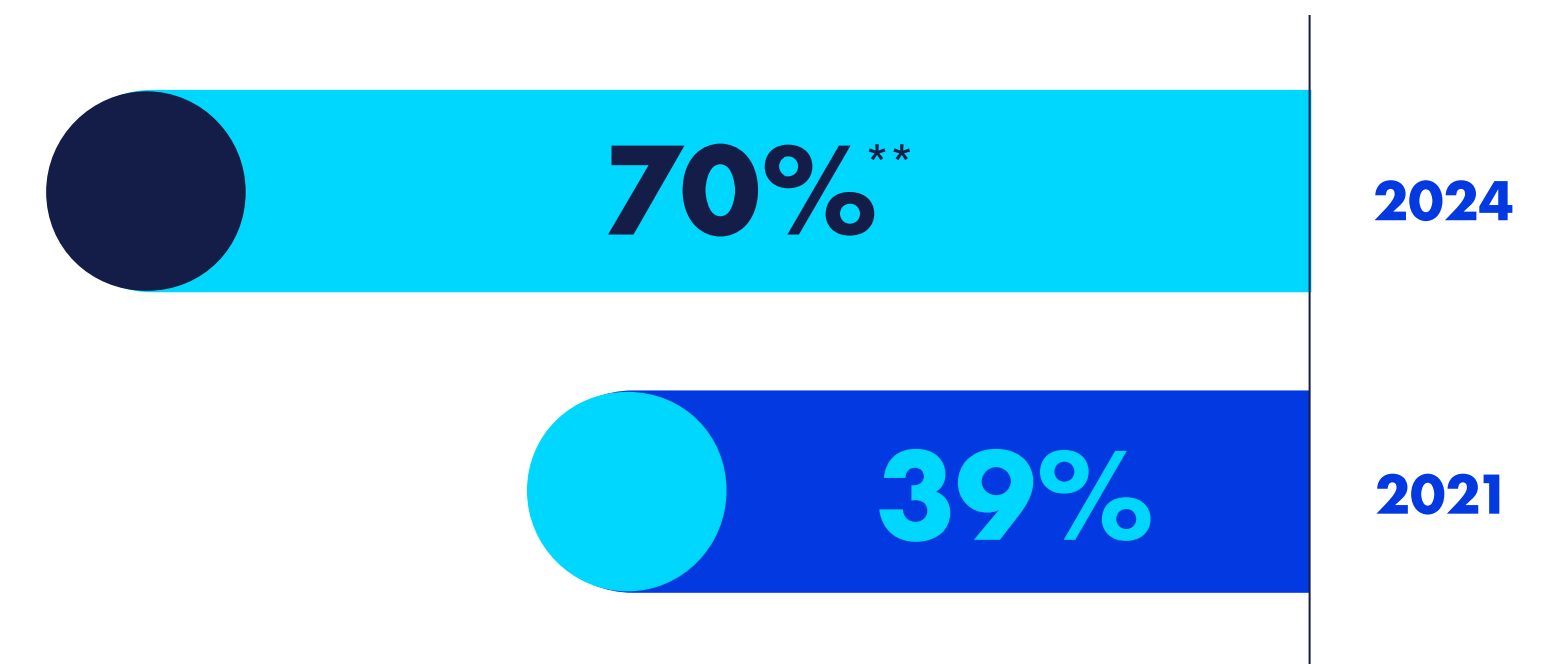
**statistically significant at 95% confidence

Compared to 2021, there has been a massive increase in the industry believing that the LGBTQ community is very important to their business. In 2021, 39% of the industry thought this, and 70% believed this in 2023. This means there has been a +79% increase in the industry recognizing that the LGBTQ community is very important to their business. With a purchasing power of **\$ 1.4 Trillion in the U.S.** and younger generations, specifically Gen Z, **being far more likely to be part of the LGBTQ community**, the advertising industry sees our community's critical value to their business.

SolStock/E+ via Getty Images



There has been huge growth in the industry recognizing the importance of the LGBTQ community to their business



The LGBTQ community is very important to my/my client's business

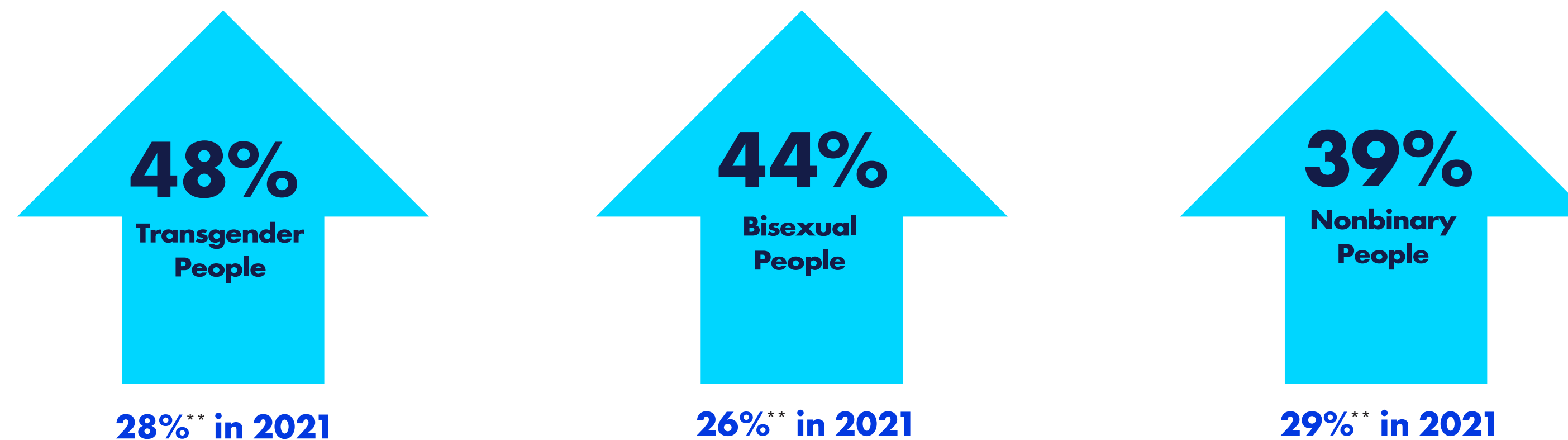
THE PURCHASING POWER OF THE LGBTQ COMMUNITY IS \$1.4 TRILLION IN THE U.S.

** statistically significant at 95% confidence

The industry is also placing more importance on featuring transgender, nonbinary, and bisexual people compared to 2021. This change in importance may be due to the rapid increase in anti-LGBTQ legislation in the United States, most of which target the rights of trans people and, more specifically, trans youth. Lawmakers have proposed 527 anti-LGBTQ bills across the U.S. since January 1, 2024, according to the ACLU. Importantly, from our [Accelerating Acceptance](#) research, only 26% of non-LGBTQ Americans personally know a transgender person, and only 16% know a nonbinary person, which makes representation even more critical as the majority of consumers will learn about trans and nonbinary people through the media. Meanwhile, though 40% of Americans say they know a bisexual person, bisexual inclusion is difficult in short-form content, as storytelling time is necessary

to represent bisexual people adequately. Bisexual representation among LGBTQ characters in primetime scripted media such as film and television is still only at 24% and 21%, according to GLAAD's *Where We Are on TV* and *Studio Responsibility Index*, respectively. Fair and accurate inclusion of our community must occur outside of these forms of opt-in media, such as in advertising, which has an outsized opportunity to change hearts and minds. LGBTQ people need to see more stories, more depictions, and more ads that feature our community, especially those who have been historically underrepresented.

VERY IMPORTANT TO FEATURE IN ADVERTISING



** statistically significant at 95% confidence

THE FEAR OF BACKLASH IS MORE PRONOUNCED THIS YEAR

Anthony Miller/Moment via Getty Images

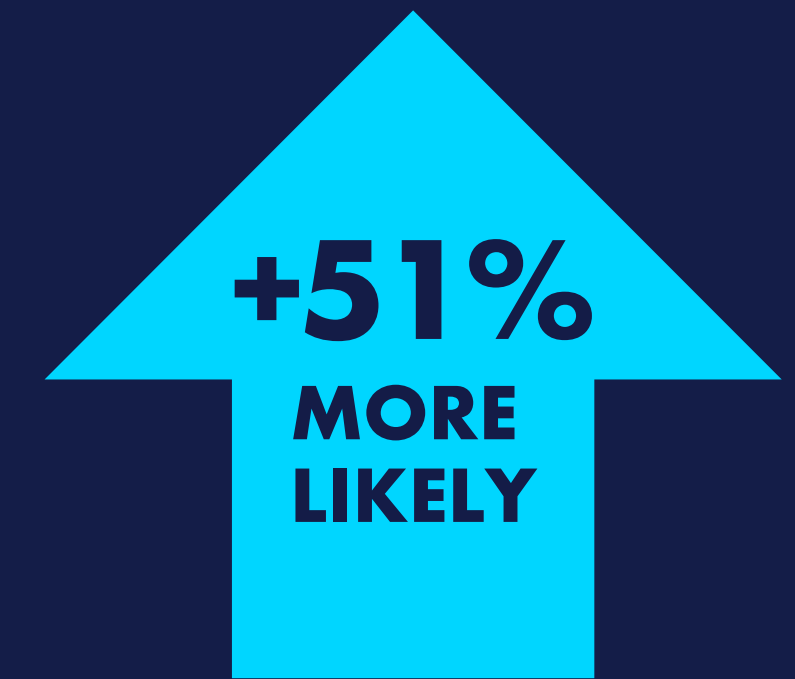
In the onslaught of current anti-LGBTQ legislation, hateful rhetoric, and political discourse, it has never been more important to highlight the LGBTQ community. GLAAD's **2024 Accelerating Acceptance** report shows that media exposure drives familiarity with our community by up to +50% and comfortability by up to +35%.

From a business perspective, inclusion undoubtedly makes a difference. Our **2023 Accelerating Acceptance** report showed that 70% of non-LGBTQ adults believe companies should publicly support the LGBTQ community through practices like hiring, advertising, and sponsorships, and 3 out of 4 non-LGBTQ adults are comfortable seeing our community in ads.

Most Americans not only support our community but expect brands to depict people in their advertising that reflect the diversity of the world we live in today. Our soon-to-be-released *2024 Advertising Visibility Index* found that consumers are +51% more likely this year than 2023 to believe advertisers are not doing enough to represent the LGBTQ community appropriately. There is a gap in their expectations of advertisers and what they see on screens. 65% of adults and 74% of Gen Z adults place a responsibility on the part of the advertising industry to give visibility in their content to LGBTQ people, couples, families and communities. This is in contrast to the perceptions of backlash posed by the media and anticipated by brands over this past year, and it aligns with strong purchase intent communicated by LGBTQ and non-LGBTQ consumers. Data from MRI-Simmons shows nearly 3 out of 4 LGBTQ adults and over 2 out of 5 non-LGBTQ adults say they are more likely to purchase a product or service from a company or brand that supports the LGBTQ community.¹

CONSUMERS ARE

this year than 2023 to believe
advertisers are not doing enough
to represent the LGBTQ
community appropriately



NEARLY 3 OUT OF 4 LGBTQ ADULTS AND OVER 2 OUT OF 5 NON-LGBTQ ADULTS

say they are more likely to purchase a product or service
from a company or brand that supports the LGBTQ community.¹

Despite that evidence, the landscape of inclusion and representation of our community in advertising took a negative turn during Pride 2023, when a few brands received backlash for their LGBTQ-inclusive partnerships or Pride-themed merchandise from a loud but small group of anti-LGBTQ extremists. The backlash resulted in two brands changing or moving away from their LGBTQ inclusion, but it also resulted in a media narrative led by those extremists to call for Pride to be “toxic.” Though the two brands faced public backlash, hundreds stayed true to their messaging and support of the LGBTQ community during Pride, and any backlash quickly subsided. Boycott strategies have changed over the past year to broadly attack diversity, equity, and inclusion (DEI) instead of LGBTQ inclusion exclusively. While a handful of brands publicly announced changes to DEI commitments, the industry at large is increasing legal oversight of but understands the necessity for DEI, with 83% of brands keeping their DEI initiatives intact, according to [the Association of Corporate Citizenship Professionals](#).

Our *Advertising Visibility Index* addresses brand activity in 2024 compared to 2023. In it, we discuss how changes or perceived decreases in the visibility of brand engagements during Pride 2024 did not signal a reduction in their commitment. We have seen that instead, brands have been increasingly more intentional about how they are showing up and are looking towards a 365-day approach to inclusion. This kind of year-round commitment to our community is a core recommendation of GLAAD.

Alina Rudyva/Bell Collective/DigitalVision via Getty Images



We know that our community is critical of companies who pop in to be supportive for one month out of the year and then leave, said Meghan Bartley, the brand engagement lead at GLAAD. It feels like we aren't cared about as a community.²

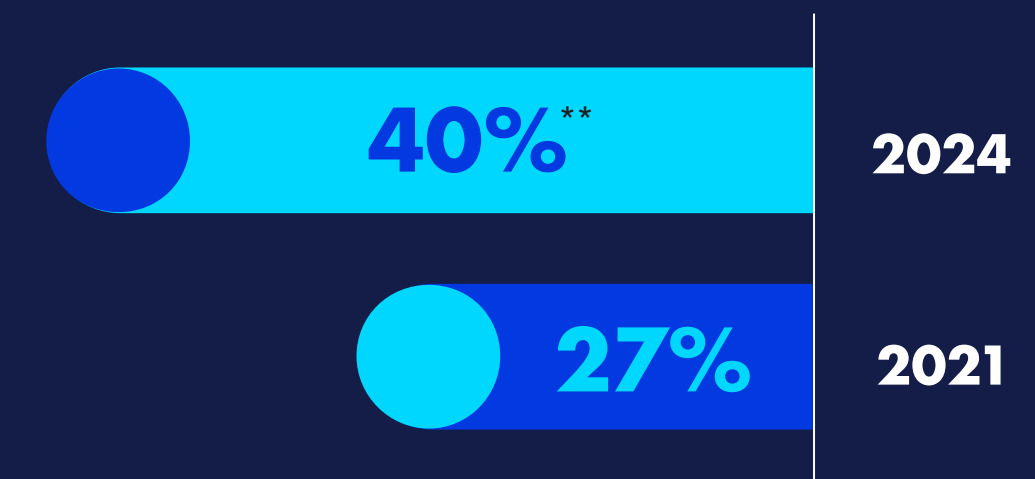
We also heard this echoed in our survey, with the industry being +52% more likely this year compared to 2021 to completely agree that they “show support of LGBTQ people and causes in other ways (besides including us in multi-platform video ads).” However, other themes also emerged more pronounced this year than 2021, including the need for internal commitments. In particular, the industry is +48% more likely to completely agree this year that their organization(s) “need to be more inclusive internally before we can feature diverse groups in our advertising.”

With a growing workforce of young adults who are more likely to be in the LGBTQ community, know LGBTQ people, and support the community, being a brand ally is far from controversial. Data from MRI-Simmons shows that 84% of Americans have an LGBTQ-related cause they find important for them to support.³ In our *Advertising Visibility Index*, we heard again from consumers about the conditions brands must meet before they would

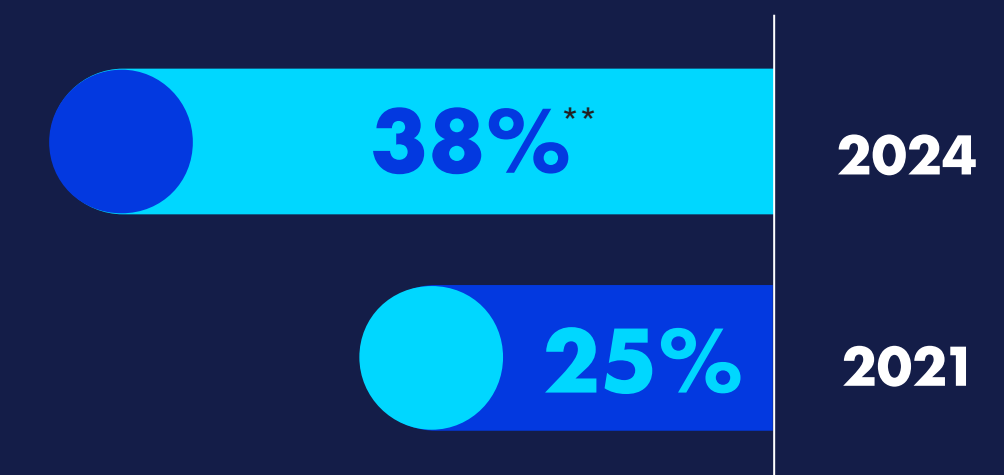
feel comfortable seeing our community represented in ads. Providing inclusive, relevant policies and benefits to LGBTQ employees is the first condition brands must meet. This is followed by hiring LGBTQ talent in front of and behind the scenes and involving LGBTQ employees/stakeholders in creating LGBTQ-inclusive advertising. It is clear to consumers and the industry that inclusive protections and policies for LGBTQ employees are critical before a brand considers including our community to benefit its bottom line.

The question is, do you have those policies in place? If not, why?

Our organization needs to be more inclusive internally before we can feature diverse groups in our advertising



Instead of using our multi-platform video advertising, we show our support of LGBTQ people and causes in other ways



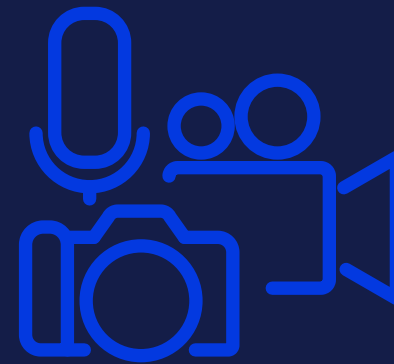
** statistically significant at 95% confidence

CONDITIONS CONSUMERS SAY BRANDS NEED TO MEET BEFORE THEY WOULD BE COMFORTABLE SEEING LGBTQ PEOPLE IN ADS:



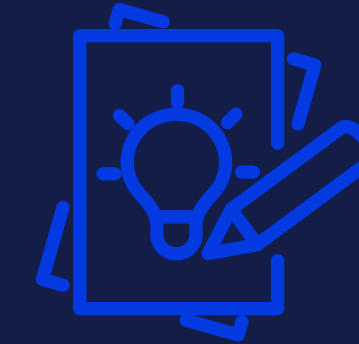
Provide Relevant Benefits to their LGBTQ Employees

65% AGREE



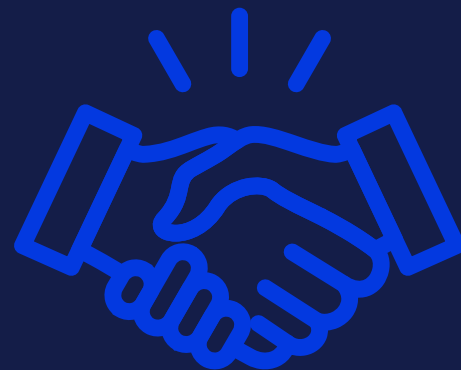
Hire LGBTQ Talent Infront and Behind Camera

65% AGREE



Involve LGBTQ Stakeholders in Advertising Creation

63% AGREE



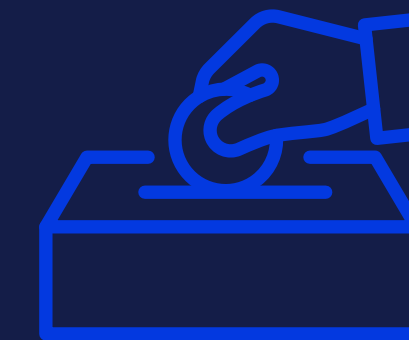
Show Partnerships they have with the LGBTQ Community

59% AGREE



Amplify LGBTQ Voices

57% AGREE



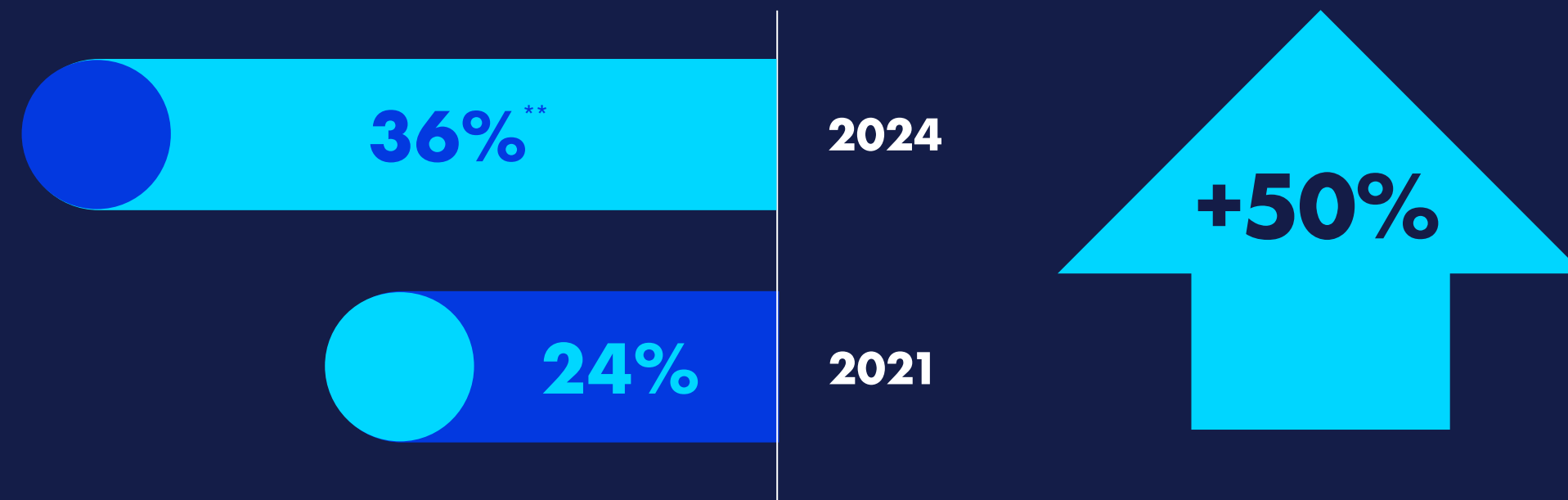
Donate to LGBTQ Non-Profits

52% AGREE

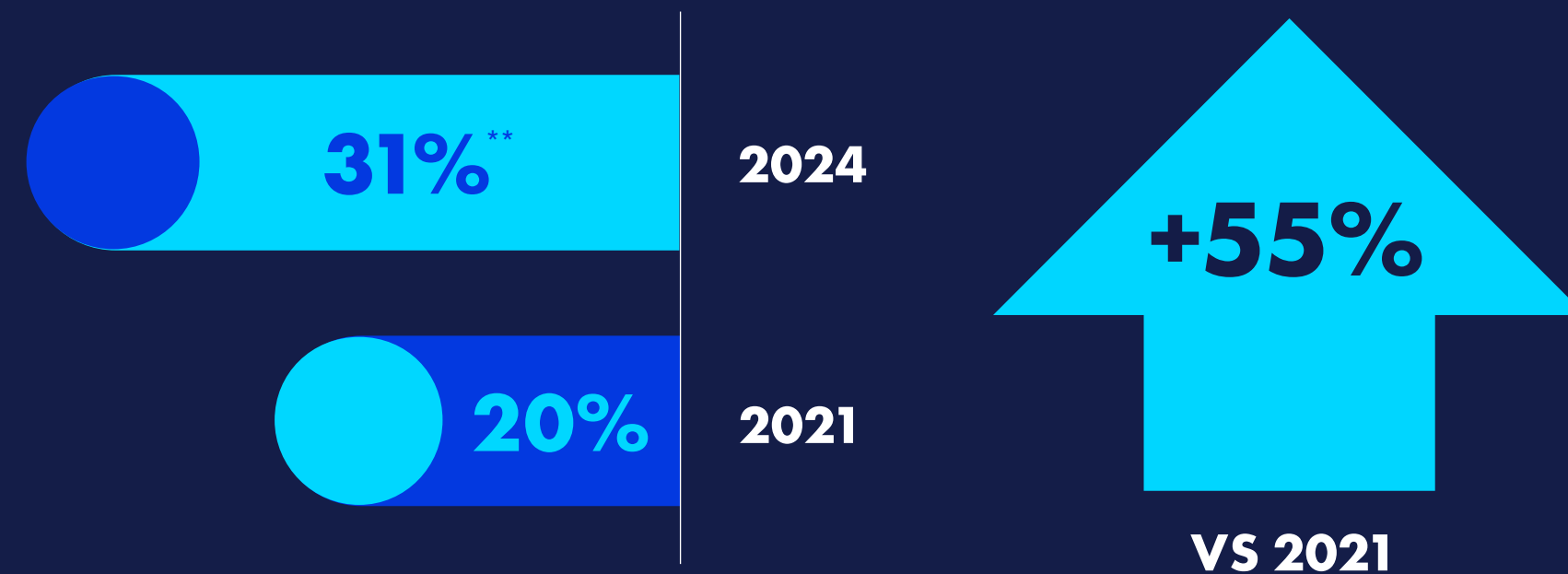
Source: GLAAD's Advertising Visibility Index

An inauthentic execution of LGBTQ people and scenarios would lead to a larger backlash than not featuring them in ads at all

(% completely agree)



Advertisers and agencies are +55% more likely this year to say they don't have the expertise and knowledge to get representation "right"



We don't have the expertise and knowledge to get the representation of LGBTQ people and scenarios in advertising "right"

percent completely agree

** statistically significant at 95% confidence

Brands and agencies are facing fear of backlash and boycotting, and the reasons are multifaceted. **The industry is more fearful of facing backlash and boycotting due to LGBTQ inclusion, as opposed to facing backlash and boycotting for lack of LGBTQ inclusion.** But the fears go beyond inclusion alone. Data from our survey shows the industry is more fearful this year of an inauthentic execution resulting in backlash and realize they don't have the expertise to get representation "right." This year, industry executives are +50% more likely to say that an "inauthentic execution of LGBTQ people and scenarios would lead to a larger backlash than not featuring them in ads at all." They are also +55% more likely to say they "don't have the knowledge to get the representation of LGBTQ people and scenarios in advertising 'right.'"



**COMPANIES THAT HAVE
FACED BACKLASH ARE EVEN
MORE COMMITTED TO LGBTQ
INCLUSION IN ADVERTISING**

DBenitostock/Moment via Getty Images

“

Americans are nearly twice as likely to say they would want to back companies facing criticism for supporting people in the LGBTQ community rather than backing their critics.⁴

While our research shows that fear exists within the industry, it is not based on the realities of the few companies that faced recent backlash. Our survey of industry executives found that companies who have faced backlash are not stepping away from their inclusion or their support of LGBTQ people. It's the opposite. Compared to those who have not, companies who have received backlash for LGBTQ-inclusive efforts in marketing and advertising are up to 1.7 times more likely to believe that featuring our community is very important. They are up to 1.6 times more likely to expect their commitment to LGBTQ people in advertising to increase in the next year.

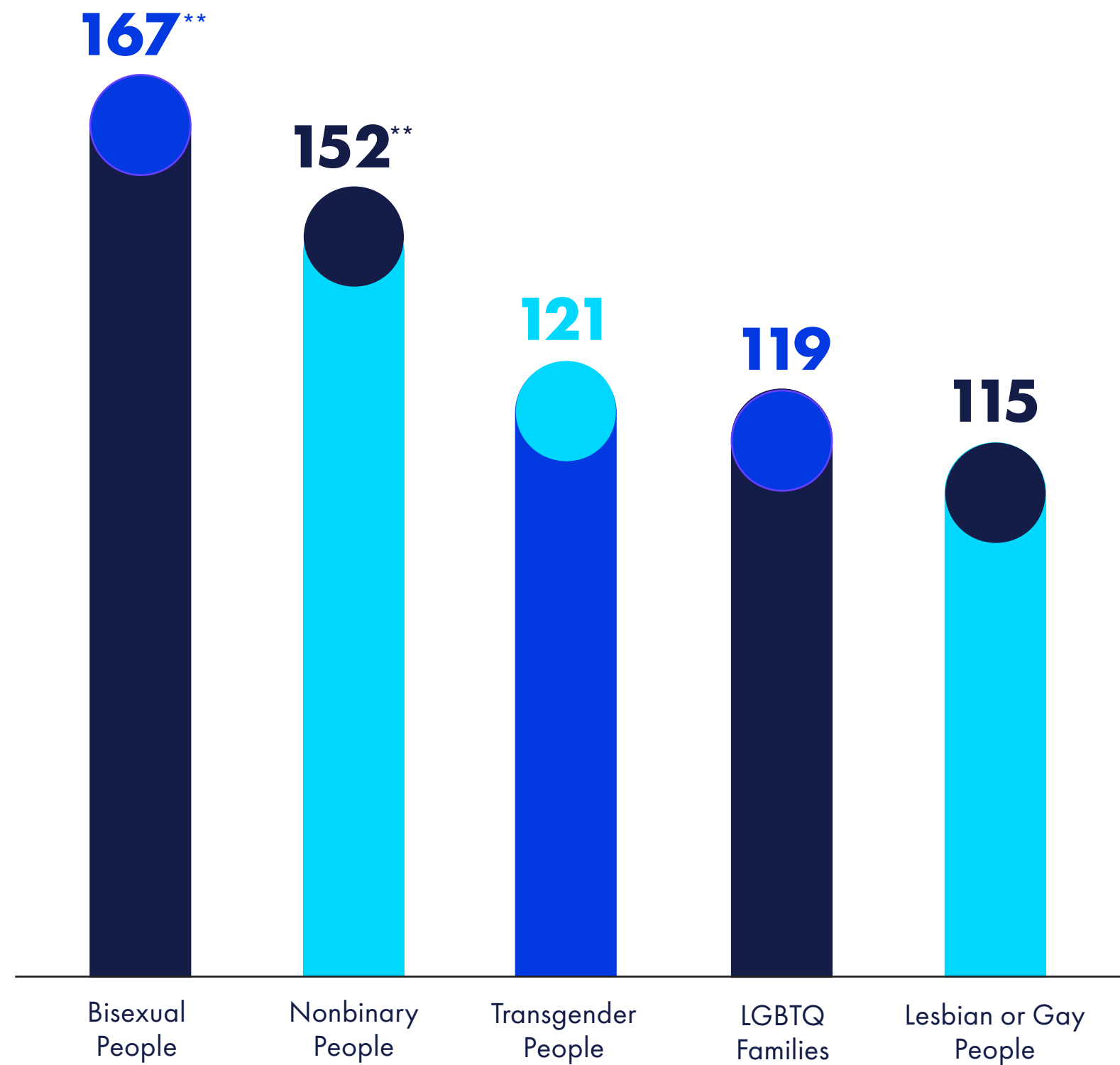
Consumers are more likely to support brands facing backlash rather than support the critics who are causing the backlash, helping brands to continue doubling down on their LGBTQ inclusion plans. In June 2023, during Pride month, we fielded questions with Ipsos' KnowledgePanel about consumers' understanding and support of brands. In that research, we found Americans are nearly twice as likely to say they would want to back companies facing criticism for supporting people in the LGBTQ community rather than backing their critics.⁴



10'000 Hours/DigitalVision via Getty Images

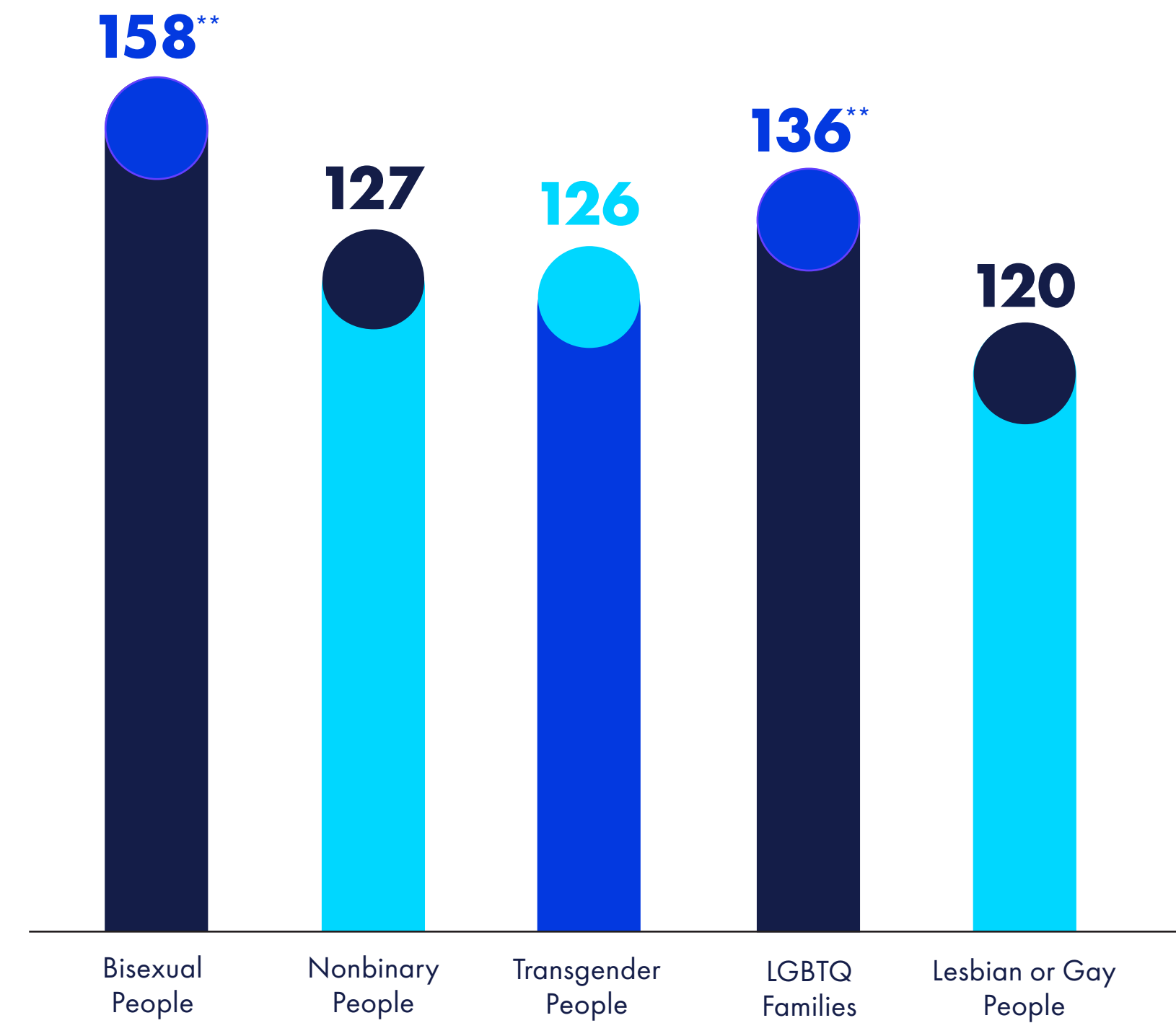
COMPANIES THAT HAVE RECEIVED BACKLASH ARE UP TO 1.7X MORE LIKELY THAN THOSE WHO DIDN'T TO BELIEVE FEATURING LGBTQ PEOPLE IS VERY IMPORTANT

Index of those who received backlash vs. those who didn't



AND—DESPITE RECEIVING BACKLASH—ARE UP TO 1.6X MORE LIKELY TO INCREASE THEIR COMMITMENT IN FEATURING US COMPARED TO LAST YEAR

Index of those who received backlash vs. those who didn't, who expect the porportion of time dedicated to including LGBTQ people to increase in the next year



** statistically significant at 95% confidence

Our industry survey also found that nearly HALF of advertisers and agencies completely agree that companies must be prepared to stand by their decision to support or include LGBTQ people in advertising **This number grows to nearly 90% for executives in the industry who agree completely or agree somewhat.**

Staying true to your brand values while seeking guidance from trusted LGBTQ resources, supporting the LGBTQ community year-round in a measured, intentional, and authentic way, and having a response plan in place will alleviate backlash in the unlikely case it comes.

FOTOGRAFIA INC./E+ via Getty Images



The advertising industry agrees, response preparedness and standing by your decision to include our community are very important

**NEARLY 1 IN 2
COMPLETELY AGREE**

companies must be prepared to stand by their decision to support or include LGBTQ people in advertising

TOOLS THE INDUSTRY NEEDS TO BE COMMITTED TO LGBTQ INCLUSION



RicardoImagen/E+ via Getty Images

Since executives do not feel they have the knowledge to best support LGBTQ inclusion but understand consumer demand, they must learn what tools and resources executives need to remain and grow their commitment to LGBTQ inclusion.

The industry indicated that the ability to partner with nonprofits who can provide guidance is the #1 tool or resource they need to be more committed to LGBTQ inclusion.

Half of the industry executives surveyed chose this. While other resources like sales lift studies, social media best practices, and conducting a risk assessment are essential tools the industry needs, industry decision-makers chose nonprofit guidance the most.

GLAAD and the GLAAD Media Institute subject matter experts work with hundreds of brands, agencies, Hollywood producers, streaming services and media companies, sports leagues, and gaming developers, among many others. We consult, advise, train, and educate leaders to respond to consumer demands, follow cultural shifts towards increased community size, and understand brand opportunities to change hearts and minds. Our team provides guidance the industry needs to provide authentic, fair, and accurate representation, resulting in media and content strategies in service to the current LGBTQ community and our allies, who make up the majority of consumers today.

Which of the following would make you more committed to LGBTQ inclusion advertising?

- 49% ● Ability to partner with nonprofits that can provide guidance
- 40% ● Sales lift showing positive impact of LGBTQ inclusion
- 39% ● Providing security and safety support for your employees/client's employees
- 39% ● Social media response best practices support
- 37% ● Having media response/crisis communications playbook to respond to backlash
- 37% ● Conducting risk assessment before launching an LGBTQ inclusive campaign

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MEGHAN BARTLEY
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Vice President of Research and Reports at GLAAD

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METHODOLOGY

This quantitative research study was conducted online among a total of 200 business decision-makers in late 2023, with the interviews with high-level marketing communication executives equally divided among advertisers and advertising agencies. Respondents were screened to represent a range of senior titles including C-Suite, EVP, VP, Director and Manager-level employees.

Advertiser respondents were specifically screened to work at organizations with annual media spending over \$50 million on B2C advertising; qualifying respondents reported being personally responsible for at least \$15 million of spending and that multi-platform video advertising was a meaningful part of the total spending. Respondents were key influencers/final decision-makers on areas such as managing/allocating ad budget, messaging and content strategy, casting, and/or approving final advertising.

Agency respondents were screened to ensure their largest B2C account had spending over \$15M annually on B2C advertising, and multi-platform video advertising was a meaningful part of the total ad spend. Qualified respondents were key influencers/final decision makers for areas such as account management, message strategy, casting or creative development.

NOTES

1. MRI-Simmons, 2024 June LGBTQ and Gender Identity Study
2. CBS News, 'Major brands scaled back Pride Month campaigns in 2024. Here's why that matters.' June 29, 2024.
<https://www.cbsnews.com/news/pride-month-campaigns-2024-major-brands-scaled-back-why-that-matters/>
3. MRI Simmons, June 2024 LGBTQ and Gender Identity Study (P18+)
4. <https://glaad.org/pridefacts>



The **GLAAD MEDIA INSTITUTE** provides training, consultation, and research to develop an army of social justice ambassadors for all marginalized communities to champion acceptance and amplify media impact.

[GLAAD.ORG/INSTITUTE](https://www.glaad.org/institute)