

ADVERTISER & AGENCY
PERSPECTIVES ON
LGBTQ INCLUSION STUDY

EXECUTIVE SUMMARY

**THE
VISIBILITY
PROJECT**



GLAAD is known for our annual data on LGBTQ representation in film and television, as well as for measuring levels of overall acceptance towards LGBTQ Americans. However, last year, GLAAD launched its first-of-its-kind research "LGBTQ Inclusion in Advertising & Media" in partnership with Procter & Gamble investigating LGBTQ representation in advertising among consumers, revealing how crucial greater representation is to drive greater acceptance and understanding of LGBTQ people and issues.

For the second year GLAAD and P&G have partnered to undertake another landmark study - this year measuring the attitudes and perspectives of the advertisers and agencies, the real key decision-makers in the advertising business, who determine what we consume each day. Just as important as film and TV, advertising is a prevalent and powerful medium, just as responsible, if not more, for LGBTQ representation and accelerating acceptance.

As strategic partners, GLAAD and P&G, the world's largest advertiser, are publishing the results of this study in order to drive more responsible LGBTQ representation and inclusion across the advertising industry. In our "Advertiser and Agency Perspectives on LGBTQ Inclusion Study," the data proves inclusion is not only good for business, but that doing so is a force for positive cultural change. After partnering on several advertising campaigns including Pantene's trans-inclusive "Home for the Holidays" series, as well as working together to bring discussions about the significance of LGBTQ inclusion in advertising to a LGBTQ event held during the World Economic Forum Annual Meeting in Davos, GLAAD and P&G made a commitment - then and now - to continue to challenge the advertising industry to increase LGBTQ representation, and to increase diverse and authentic LGBTQ people, issues and scenarios in, around, and within the advertising ecosystem.

To do so, GLAAD and P&G are announcing the creation of "The Visibility Project," a multi-year campaign grounded in our original research. With compelling data and insights, we challenge the old standards of the advertising industry by welcoming innovative, creative advertisers and leaders of industry to join forces with GLAAD and P&G, working together to make the necessary, yet meaningful changes to accelerate acceptance for LGBTQ people through advertising. "The Visibility Project," will be a coalition of brands and advertisers leaders, stewards of the industry who understand the power of leveraging data, insights, and opportunity in order to be successful. As we work together, you'll understand better what you should already know -- the risk of backlash is low, and the opportunity for business success and positive social impact is great. Exactly what you need to know as you build your brand and your advertising strength!

Fewer than half of study participants feared public backlash for including LGBTQ people in advertising, a figure that would have seemed inconceivable just 10 years ago. Last year's results—which included the remarkable data point that 82% of respondents believe that including LGBTQ people in their ads reflects the company's value for all kinds of diversity—paired with this year's findings, demonstrates the power of advertising and the need to overcome all real and perceived obstacles in the way of responsible, relevant and accurate LGBTQ representation in advertising.

Simply stated, diversity, inclusion and representation are simply good for business and good for the world. Companies like the ones you lead must remember and understand that including LGBTQ people in advertising is no longer an option, but rather LGBTQ inclusion is vital and necessary in order to truly reflect the world we live in. And, isn't that what great advertising does? Truthfully and accurately depict who we are and how we live our lives. As we continue to build upon this work together, progressing and identifying the areas for growth and improvement, the current results illustrate, at a time of great political and cultural division, at a time of social and racial reckoning, entertainment and media continue to play a pivotal role in shifting culture, driving change, accelerating acceptance, and changing hearts and minds. Join us.

In solidarity,

SARAH KATE ELLIS
President & CEO, GLAAD

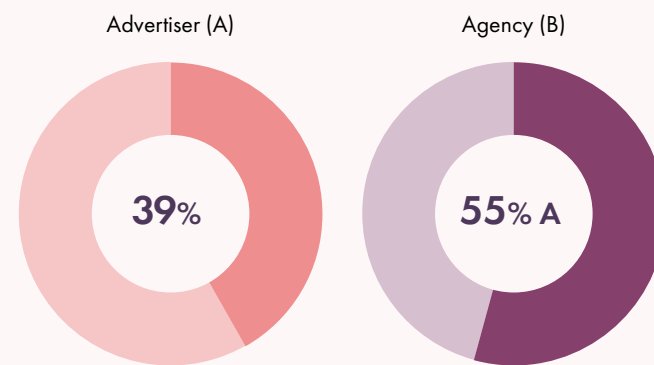
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MYTH:
Corporate Support for LGBTQ Inclusion in advertising is strong

FACT:
Despite the high visibility and support in Hollywood as well as the strong emergence of LGBTQ in our younger generation, there is relatively weak corporate support for LGBTQ inclusion in advertising, especially among Advertisers.

Support Among Top Leadership for featuring LGBTQ People and Scenarios in Advertising is NOT Strong

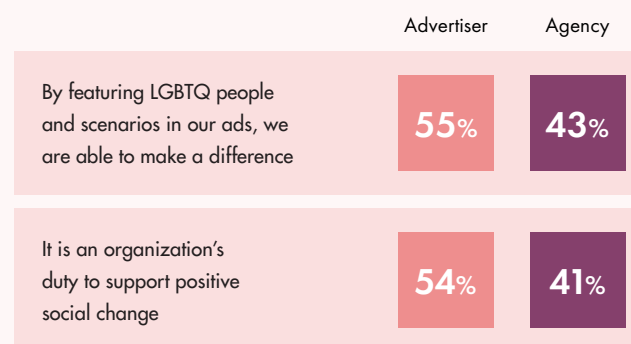
% "Agree Completely" Featuring LGBTQ People and Scenarios is Supported by Top Management



Importantly, however, advertisers more significantly understand the societal impact of using LGBTQ people in advertising, with more than half understanding they are making a positive impact through representation.

Advertisers More Significantly Understand the Societal Impact of Using LGBTQ People in Advertising

% "Completely Agree" with statement



2

MYTH:
Advertisers and Agencies believe their own culture is "very accepting" of LGBTQ people.

FACT:
Advertisers perceptions of their corporate culture present challenges in considering LGBTQ inclusion in advertising, with only slightly more than a third strongly agreeing that their own culture is inclusive and accepting of other communities. Agencies feel more poised than advertisers, with slightly more than half of agencies strongly agreeing their own culture is inclusive and accepting.

% believe their own culture is "very accepting" of LGBTQ people

% "Agree Completely" Featuring LGBTQ People and Scenarios is Supported by Top Management



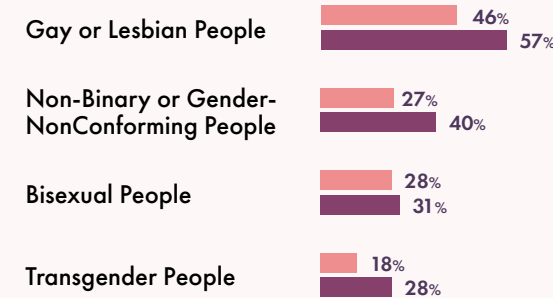
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MYTH:
Advertisers and Agencies are comfortable portraying all LGBTQ people.

FACT:
Conversations around LGBTQ inclusion focus on representation of gay and lesbian people. There is significantly less comfort and emphasis on including representation of bisexual people, trans people, and gender non-conforming and non-binary people.

% of Agencies that were involved in a conversation or decision about including the following people or scenarios in their own or clients' multi-platform video advertising.

% "Agree Completely" Featuring LGBTQ People and Scenarios is Supported by Top Management



% of Advertisers and Agencies that feel it is "very important" to use advertising to:

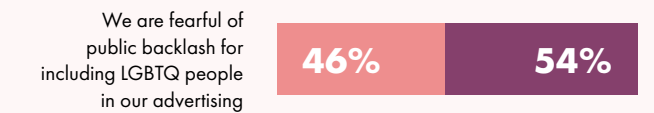
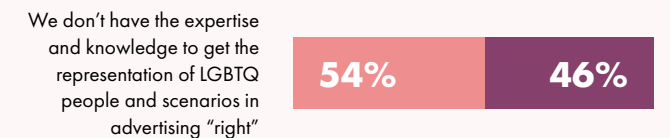
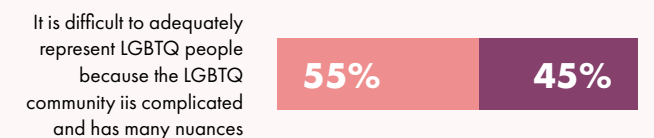
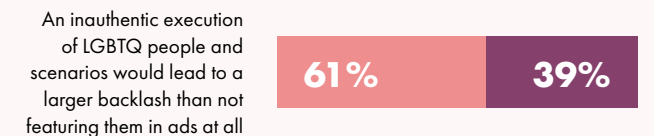


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MYTH:
Most Advertisers and Agencies are worried about negative feedback or feel there is risk in portraying LGBTQ people and scenarios in advertising.

FACT:
Despite the understood societal benefits, the majority of advertisers and agencies perceive risk with inclusion of LGBTQ people and scenarios in advertising.

However, fear of public backlash for including LGBTQ people and scenarios in advertising is not a major concern across the industry. Perceived risks from advertisers and agencies focus on challenges of authentic representation, navigating the nuances and complexity of the community, and lacking the expertise required to get representation "right".



Agree
Disagree

“Diversity, inclusion and representation are simply good for business and good for the world.”

SARAH KATE ELLIS
PRESIDENT & CEO, GLAAD



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GLAAD rewrites the script for LGBTQ acceptance. As a dynamic media force, GLAAD tackles tough issues to shape the narrative and provoke dialogue that leads to cultural change. GLAAD protects all that has been accomplished and creates a world where everyone can live the life they love.

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The survey was conducted online