



Advertising Visibility Index 2023

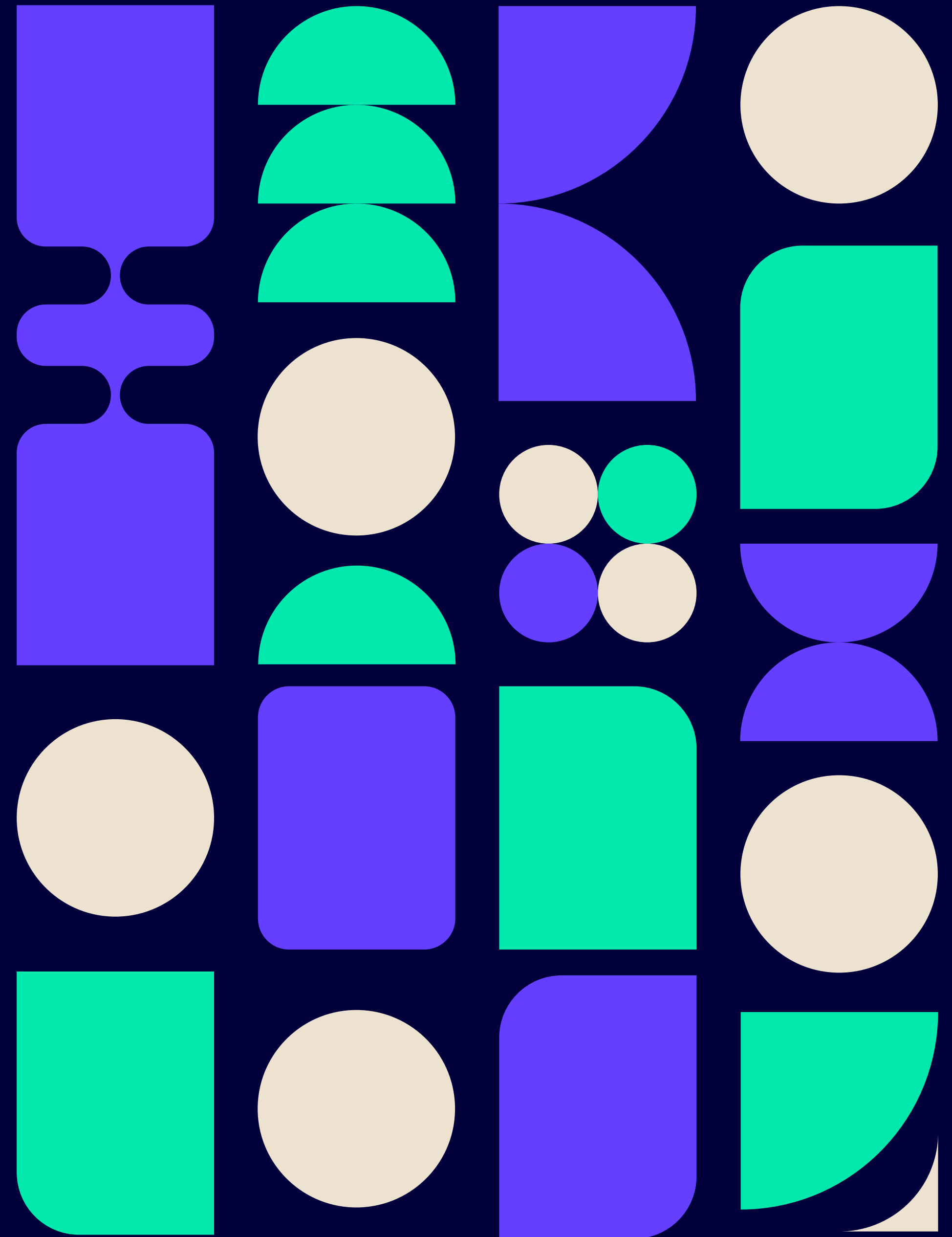


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ACKNOWLEDGEMENTS

FROM THE DESK OF SARAH KATE ELLIS

Executive Summary

Our inaugural Advertising Visibility Index was created to measure the ad industry just as GLAAD has for years measured LGBTQ representation in scripted television and film. And as we saw in the early years of studio and television measurement, our community is nearly invisible in mainstream advertising, with room to grow both in scale and in quality.

As part of GLAAD's mission to tell stories that educate the world about LGBTQ people and accelerate LGBTQ acceptance, our first year of measurement is focused on national linear TV as research shows that non-LGBTQ people are +50% more likely than LGBTQ people to watch TV shows live. But we will not stop there. Future iterations of this report plan to expand into other platforms where we can reliably collect and analyze all creatives that are aired by top spending brands on each platform.

With recent backlash from a loud but small minority of anti-LGBTQ activists attacking brands for hiring transgender spokespeople, selling Pride products, and the rash of anti-LGBTQ legislation proposed in many states, we need LGBTQ visibility in mediums that can cut through the noise and reach consumers who would otherwise not opt-in to LGBTQ-inclusive content. The brands that stick to their values and continue creating quality campaigns and initiatives that authentically and boldly feature diversity are winning the consumer game today and will continue to win out in the future.



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

Sarah Kate Ellis
President & CEO, GLAAD

Although ads can only give people a short glimpse into the LGBTQ world, the linear television advertising industry is a nearly \$70 billion market, and our research consistently proves media exposure drives LGBTQ familiarity and acceptance with non-LGBTQ people. Our 2023 Accelerating Acceptance study found that that level of familiarity grew by as much as 30% based on being exposed to the LGBTQ community in media.

The opportunity for impact is great, however, our Index found only 3% of national linear TV ads from the top ten spending brands were inclusive; an underrepresentation compared to LGBTQ representation at 7.2% in the U.S. with much higher rates of LGBTQ identities in future consumer groups, including Gen Z, of which 1 in 5 identify as part of the community according to Gallup.

Where brands are doing the work of inclusion, there are opportunities to increase the quality of representation across multiple factors. We found that all ads reviewed were insufficient in their representation.

Let that sink in, out of over 400 ads on national linear TV from the top ten advertisers in the world, not one had LGBTQ inclusion that was impactful and recognizable. Whether the ad relied on LGBTQ celebrities to be inclusive or the representation was coded or casual, and less noticeable to the average viewer, corporate allyship via visibility has room for improvement.

Celebrity inclusion was, in fact, the most important call-out from the GLAAD scorecard review and the consumer perception study. 71% of inclusive ads reviewed via our scorecard featured LGBTQ celebrities, and a majority of consumers in the perception study failed to notice LGBTQ celebrity inclusion in this year's slate of inclusive Super Bowl ads. Brands that incorporate celebrities into their campaigns need to extend LGBTQ inclusion into storytelling to capture consumers, as consumers noted empathy, humanity, and realistic stories as most important for LGBTQ inclusion. Celebrity inclusion was the least important factor across all consumer segments.



Brands have been including LGBTQ people and stories in advertising for years. What we are asking of agency and brand executives is to now focus on quantity—increasing LGBTQ storytelling, particularly outside of Pride; and quality—looking at how to not only include celebrities, but focus on realistic stories.

2023 marks the worst year on record for anti-LGBTQ legislation in the U.S. Extremist groups and fringe politicians are increasingly attacking the LGBTQ community, threatening boycotts and violence against the brands supporting us in a way we haven't seen in years. And we're seeing a small number of brand leaders follow the noise rather than the data—hesitating to act, or worse, pulling inclusive campaigns in search of solutions that placate all of their consumers. It may feel bleak for many brand leaders, but be assured, it is not. The facts are clear on every front: LGBTQ people are worth it.

GLAAD's 2023 Accelerating Acceptance study found that an overwhelming majority—91%—of non-LGBTQ people believe we should have the freedom to live our lives and not be discriminated against. 3 out of 4 non-LGBTQ people are comfortable seeing LGBTQ people in ads and the amount of non-LGBTQ people supporting equal rights for the community has been steadily increasing since 2021, now at 84%. While we are seeing record rates of harmful legislation, it is clear that these bills do not accurately reflect the American people, who are strongly supportive of LGBTQ people and are comfortable with our representation.

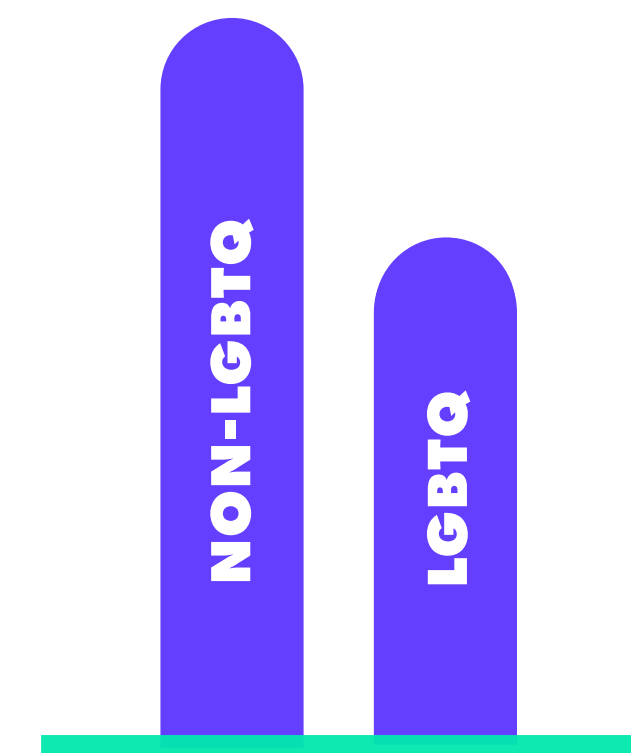
This is an opportunity for brands to meet this moment, stand behind—or intentionally build—their inclusive practices, and realize the outsized impact of their advertising. It's not a matter of if brands should be inclusive, but rather how they do it right.



1 Measuring Inclusivity: the GLAAD Scorecard

This initial report analyzes the quantity and quality of LGBTQ representation in top spending brands in national linear TV advertising. National Linear TV has the most historical tracking and analysis capabilities, has a standard currency on which advertising is currently transacted (C3 data), is the platform where many of the biggest tentpole moments take place, and research shows that non-LGBTQ people are +50% more likely than LGBTQ people to watch TV shows live.

NON-LGBTQ PEOPLE ARE



1.5 TIMES

**more likely than
LGBTQ people to
watch TV shows live**

DETAIL IN WHAT WE REVIEWED

**TOP 10 BRANDS
LINEAR TV 2022
SPENDING ACCORDING
TO ISPOT TV DATA:
\$4.3B**

**NUMBER OF ADS
REVIEWED:
436**

**TOP 10 SPENDING
BRANDS ARE
REPRESENTATIVE OF
THE INDUSTRY**

**LINEAR TV MARKET:
\$68B**

**NUMBER OF ADS
THAT WERE
LGBTQ INCLUSIVE:
14**

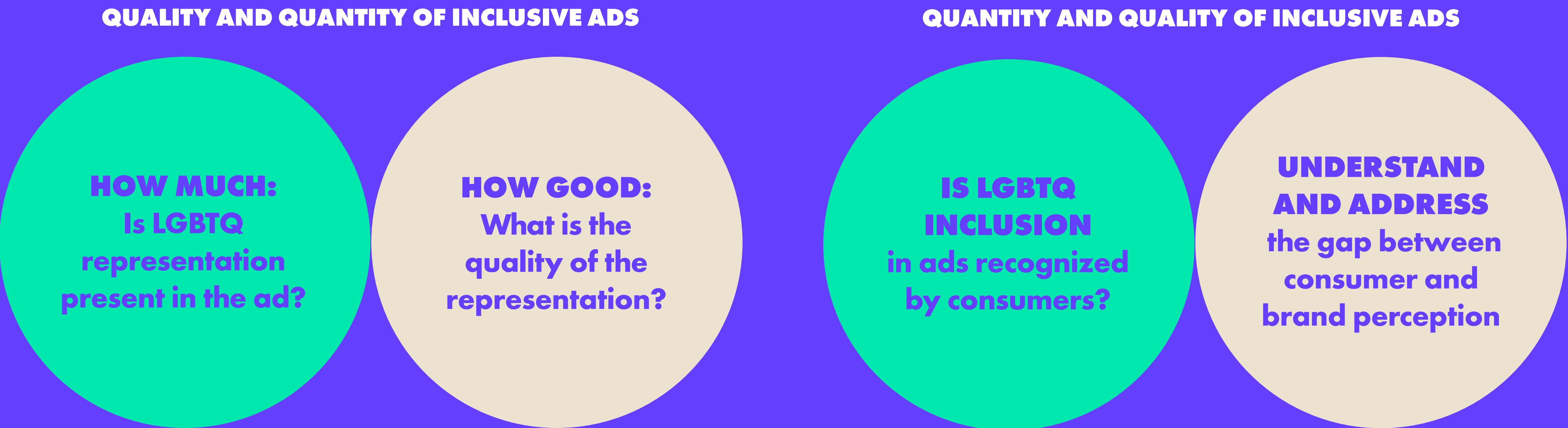
Source: Insider

RATING METHODOLOGY

The GLAAD Advertising Index Scorecard establishes a benchmark for the industry to show the quantity and quality of LGBTQ representation in advertising.

In order to get a sense of how inclusive LGBTQ ads are right now, we created a scorecard to evaluate the kind of representation present, the type of LGBTQ content illustrated to audiences, how much screentime LGBTQ people were given, as well as when and where these ads aired. Ads were given a rating on a 5-point scale that ranged from Failing to Excellent.

Quality was also considered against consumer perception. We created a consumer perception study to understand what consumers deemed important in LGBTQ representation and corporate responsibility to inclusion and measured their awareness of inclusive advertising.



WHAT GOES INTO THE RATING SYSTEM FOR AN AD

WHAT KIND OF REPRESENTATION

- Casual Representation
- Overt Representation
- LGBTQ Iconography
- LGBTQ out celebrities** /known to be LGBTQ
- Mentions of pro-LGBTQ company policies or actions

WHERE/WHEN DID IT AIR

- Did the ad only air in June?

HOW MUCH SCREEN TIME

- Time on screen** for LGBTQ (as % of total ad) $\geq 10\%$

WHAT KIND OF CONTENT

- Stories of LGBTQ joy
- Are other features of diversity present?
- Are the **storylines universal**?
- Are LGBTQ people doing **everyday things**?
- Depictions or scripted copy of LGBTQ couples or LGBTQ families

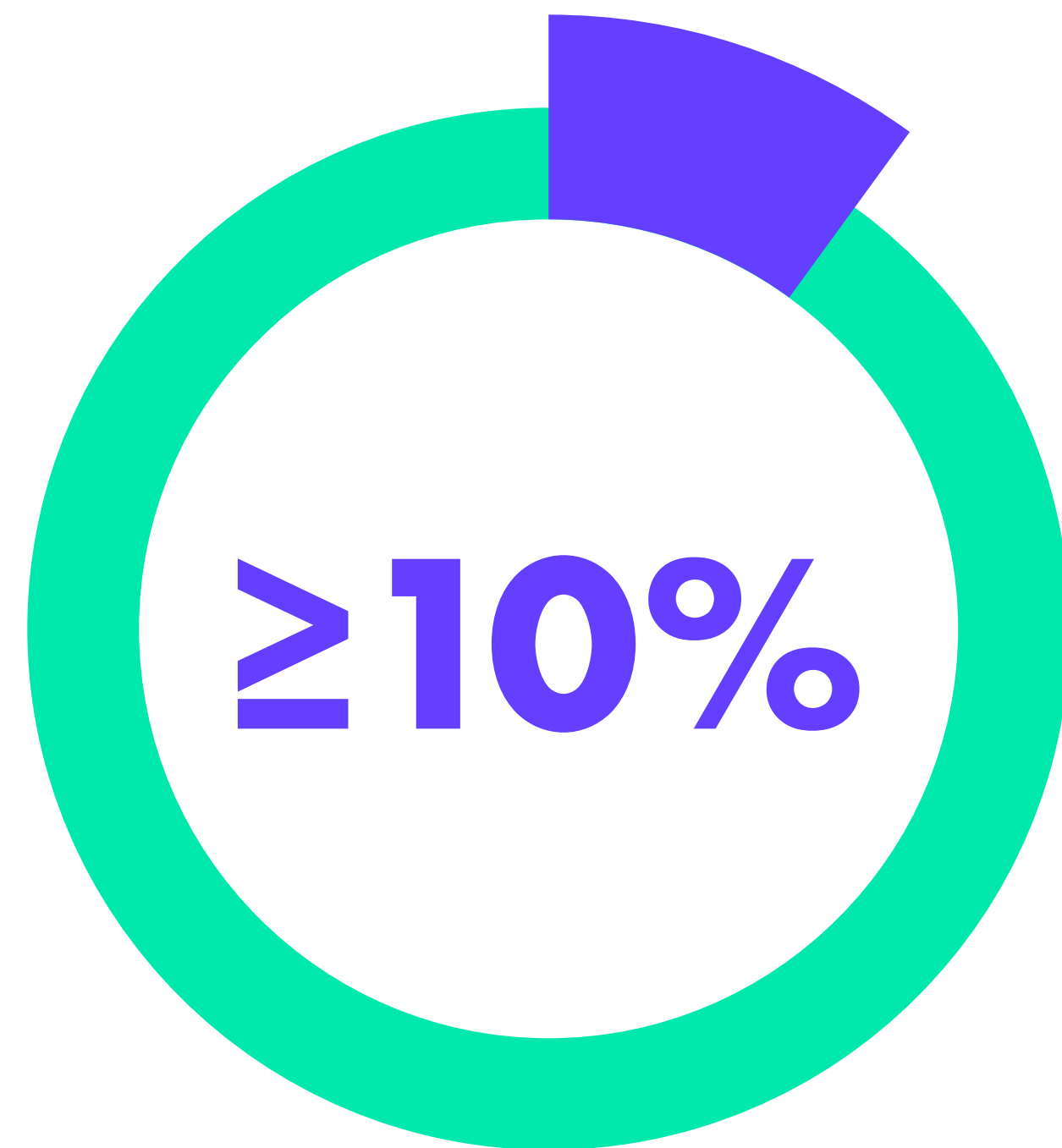
IS THE CONTENT NEGATIVE

- Stories of LGBTQ struggles or harm
- Use of stereotypes/tropes

Bold indicates higher weight into the rating



**Time onscreen
must be**



**for LGBTQ
(as % of total ad)**

**Commercial
Length**

15 SECONDS

30 SECONDS

60 SECONDS

**LGBTQ Person(s)
Time on Screen**

1.5 SECONDS

3 SECONDS

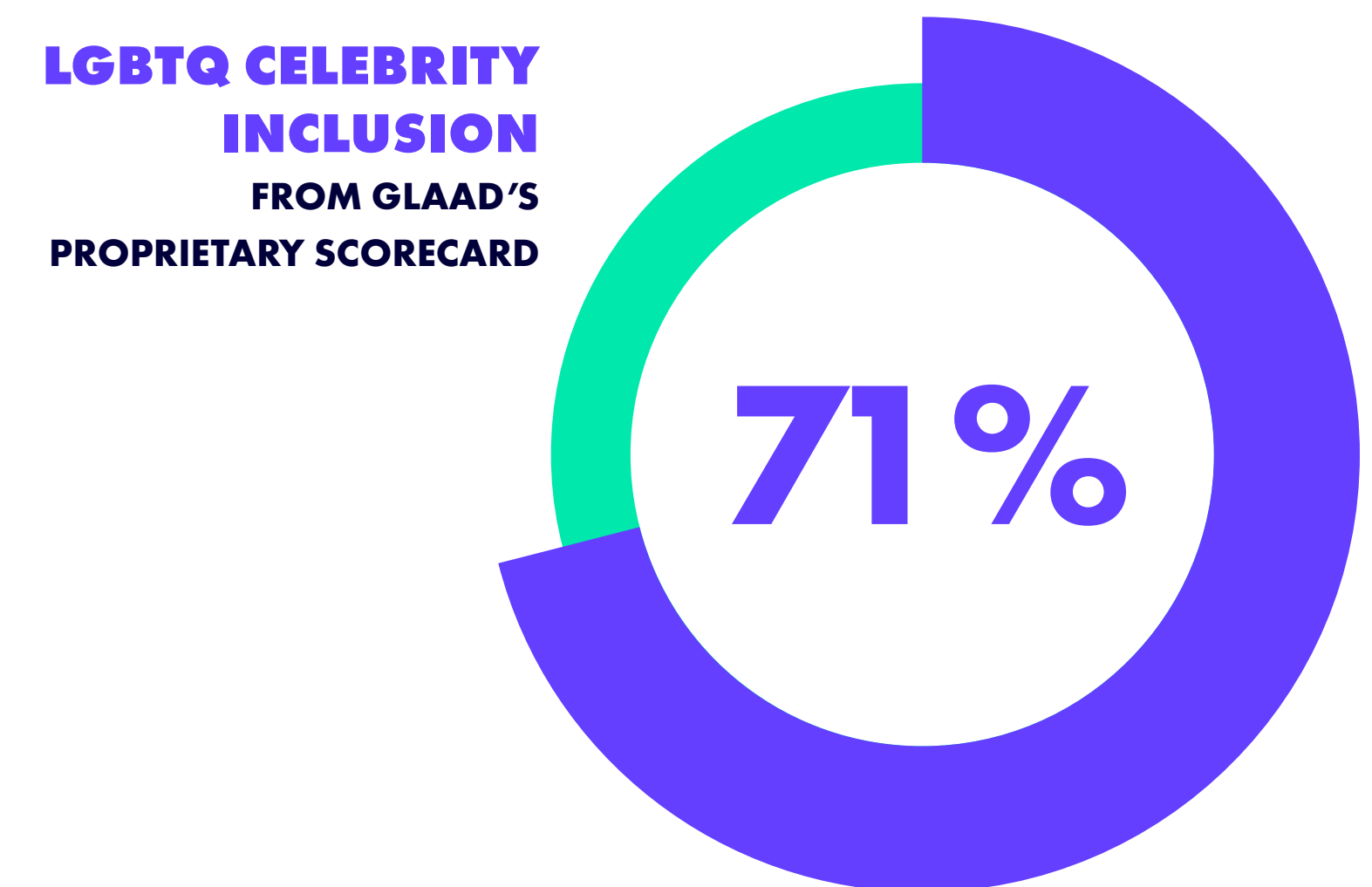
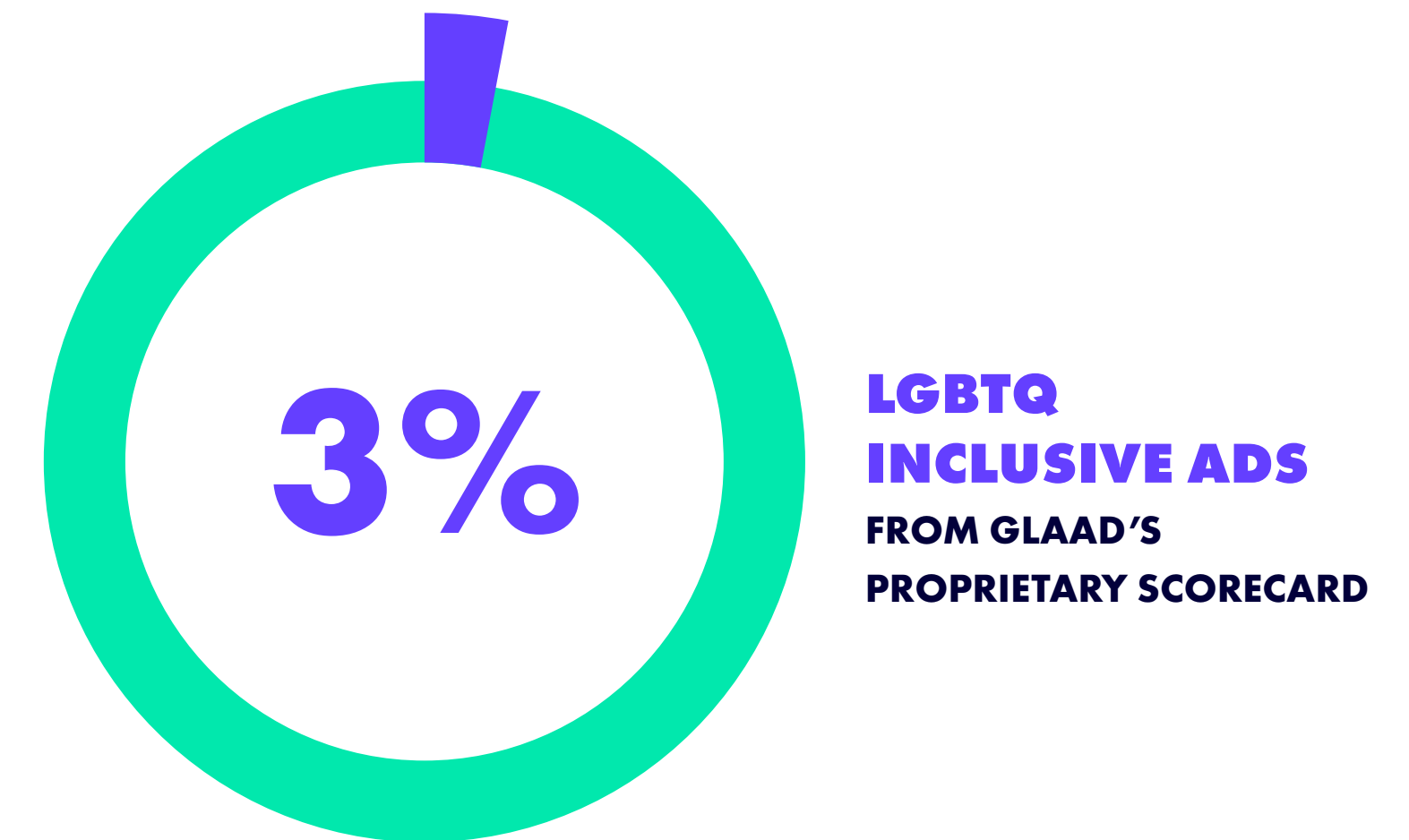
6 SECONDS

2 Insufficient & Underrepresented

Out of the over 400 ads reviewed with the GLAAD Scorecard, only 1.42% of total screentime was given to LGBTQ people or stories, and 3% of all ads reviewed could be counted as inclusive for LGBTQ representation. Comparatively, the size of the LGBTQ population in the U.S. is 7.2% of all adults, with higher representation in younger generations: 11% Millennials and up to 1 in 5 Gen Z identifying as part of the community according to [Gallup](#).

Representation is even lower in Spanish-language ads, with 2.56% of all Spanish language ads tested counted as inclusive for LGBTQ people.

Out of all ads deemed inclusive by the GLAAD scorecard, a majority (71%) used LGBTQ celebrities. Though celebrities from the community are featured—and often prominently—iconography, copy, and further storytelling is missing to tie them to the LGBTQ community, which may or may not be recognized by consumers. This celebrity focus was not as common in brand advertising overall, with only 29% of all ads reviewed featuring celebrities.

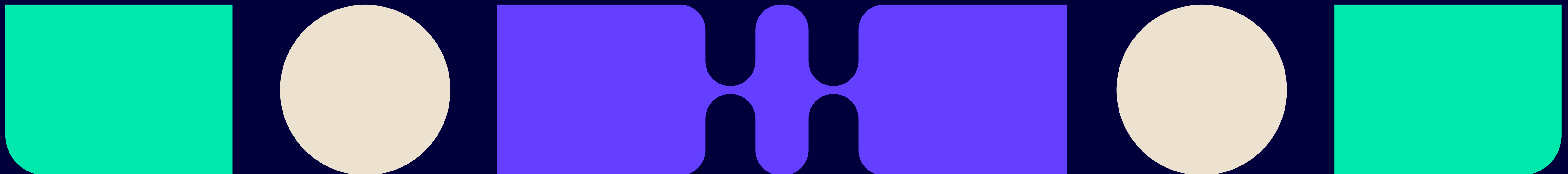


When considering the factors of the scorecard—kind of representation and content, air time, screen time, and negative portrayals—none of the inclusive ads reviewed rated higher than insufficient for inclusivity. Most commonly, ads fell into the insufficient category because LGBTQ people were featured less than 10% of the time, because inclusion was casual and ambiguous, or because of celebrity inclusion with no clear LGBTQ storytelling.

For 70% of reviewed brands, revisions to creative content could have resulted in good or higher ratings. The remaining 30% of brands were lacking any LGBTQ inclusion in their advertisements. None of the brands reviewed included visibility for transgender or nonbinary storytelling, iconography, or celebrities.

Though increased storytelling is necessary for LGBTQ people to be fairly represented and noticed by non-LGBTQ consumers and to raise the quality of inclusion beyond insufficient, every brand had opportunities to increase visibility in their existing ad slate in small ways, such as exchanging a perceived straight couple with a same-sex couple, including iconography on clothing or products, or bringing in network and streaming promotional partners that promote their LGBTQ content in the ad. These changes would have increased the quantity of inclusion, though would not affect quality. Brands will have to consider LGBTQ inclusion from the start of a creative brief, addressing the factors in our scorecard intentionally, in order to rate higher than insufficient.

None of the LGBTQ-inclusive ads rated higher than **INSUFFICIENT FOR INCLUSIVITY**



3 Consumer Expectations

The LGBTQ community is nuanced and diverse, with unique lived experiences, which is a challenge when attempting LGBTQ inclusivity in advertising. Yet, consumers, and more so young consumers, have expectations of businesses and corporations to be more inclusive in advertising. In our survey with Kantar we found that Gen Z adults were +45% more likely than the average adult to say advertisers aren't doing enough to appropriately represent the LGBTQ community in ads.



GEN Z IS

1.45 TIMES

**more likely to believe
advertisers are not
doing enough to
appropriately represent
the LGBTQ community
within their ads**

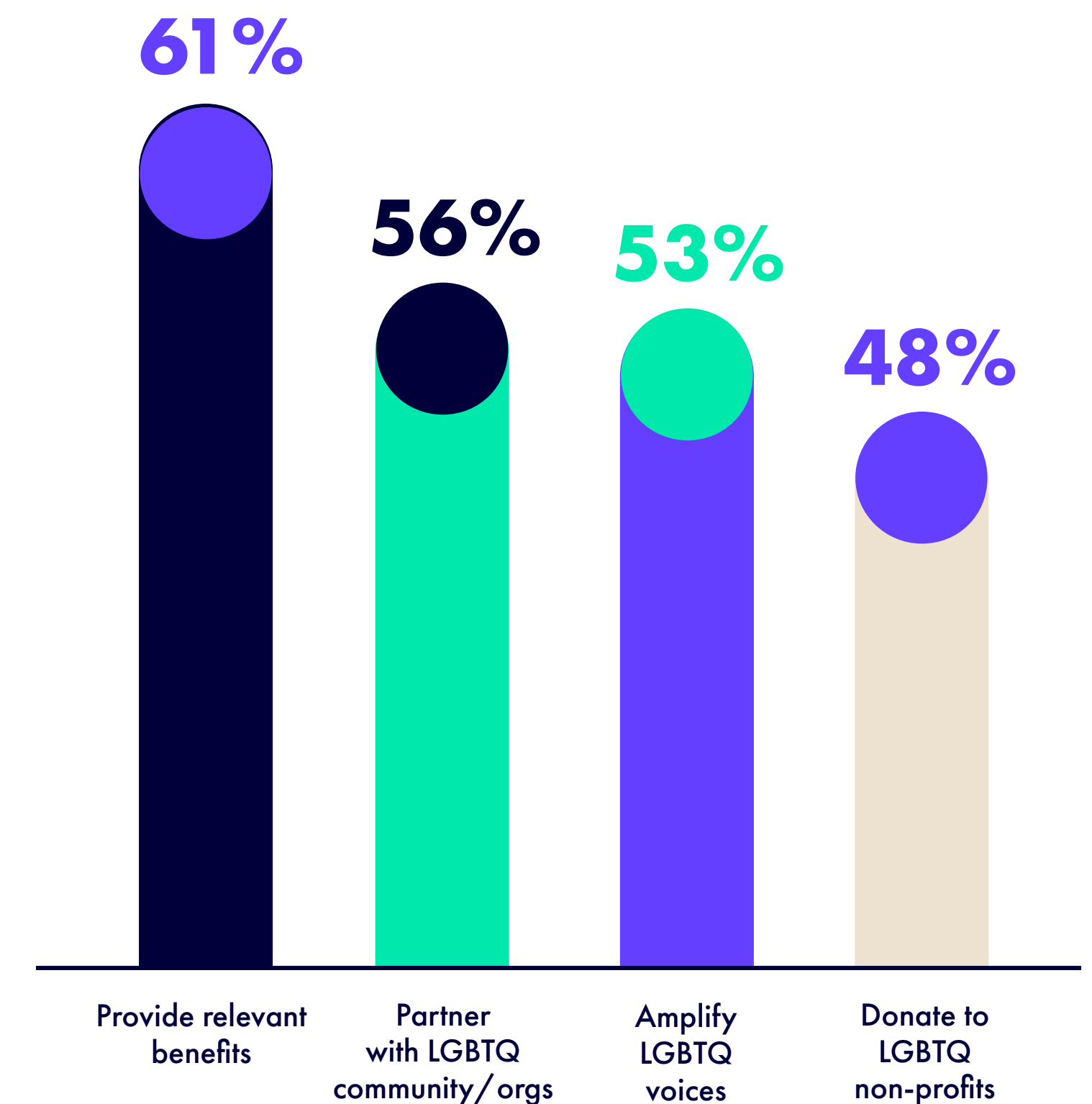
However, all consumers agreed that positive representation needs work. 80% of consumers noted that when including LGBTQ people in their advertising or content, brands should strive for positive representation that is multi-dimensional and human. Multi-dimensional representation will require brands to consider LGBTQ inclusion from the start of a creative brief and when done well, can increase the quality of the representation with the GLAAD Scorecard.

Consumers also expect brands to meet the following conditions before they would feel comfortable seeing LGBTQ representation in ads. This means, before you do the work externally in your brand messaging, make sure you are doing the work internally to support your employees, the community itself, and amplify our voices. In particular, African American, Hispanic and Asian consumers are more likely than White consumers to say amplifying LGBTQ voices is an important condition for brands to meet before they would feel comfortable seeing us in their ads. Brands must work to amplify all marginalized voices for the inclusion of those voices in brand messaging to feel authentic.

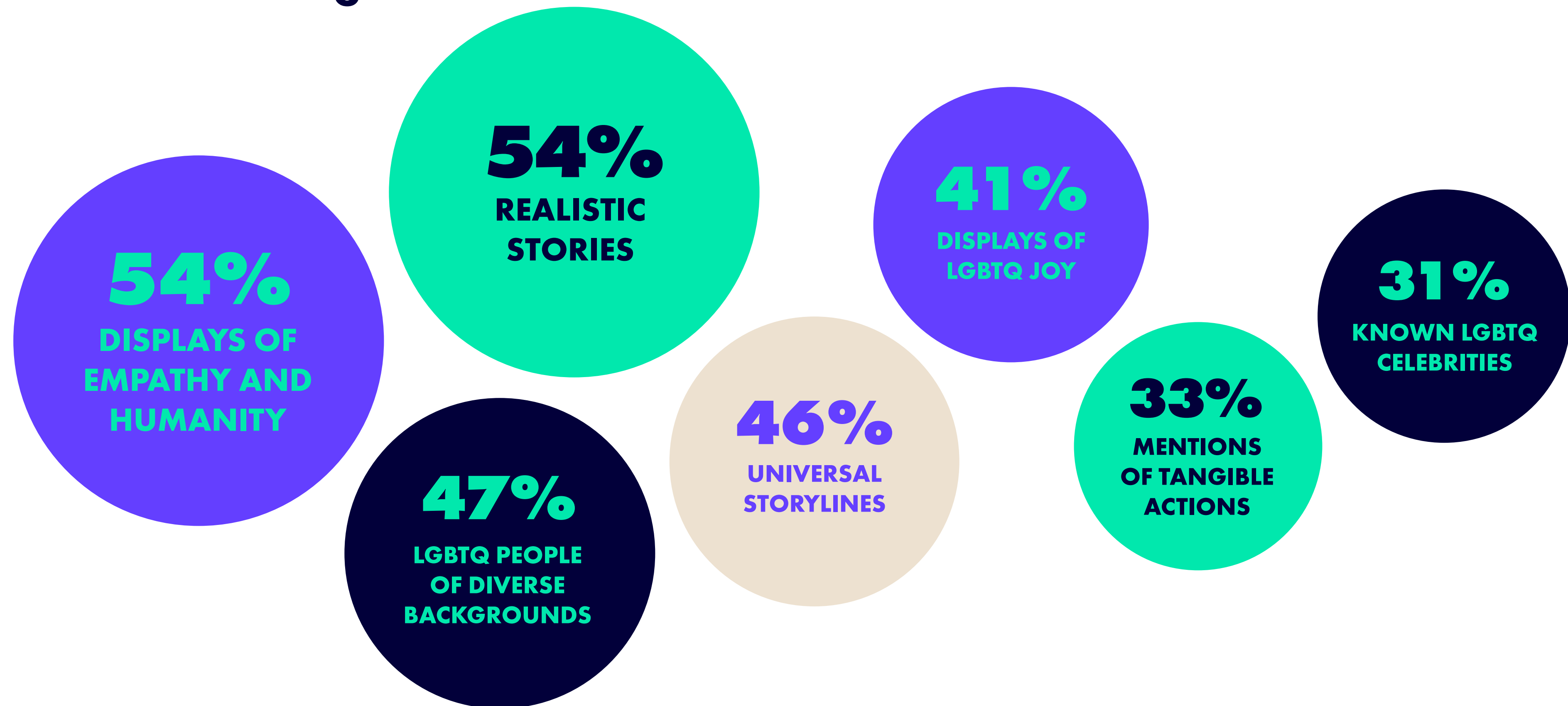


**of consumers believe
brands should have
MULTI-DIMENSIONAL
LGBTQ representation**

Conditions brands need to meet for consumers to **FEEL COMFORTABLE INCLUDING LGBTQ REPRESENTATION in their advertising**

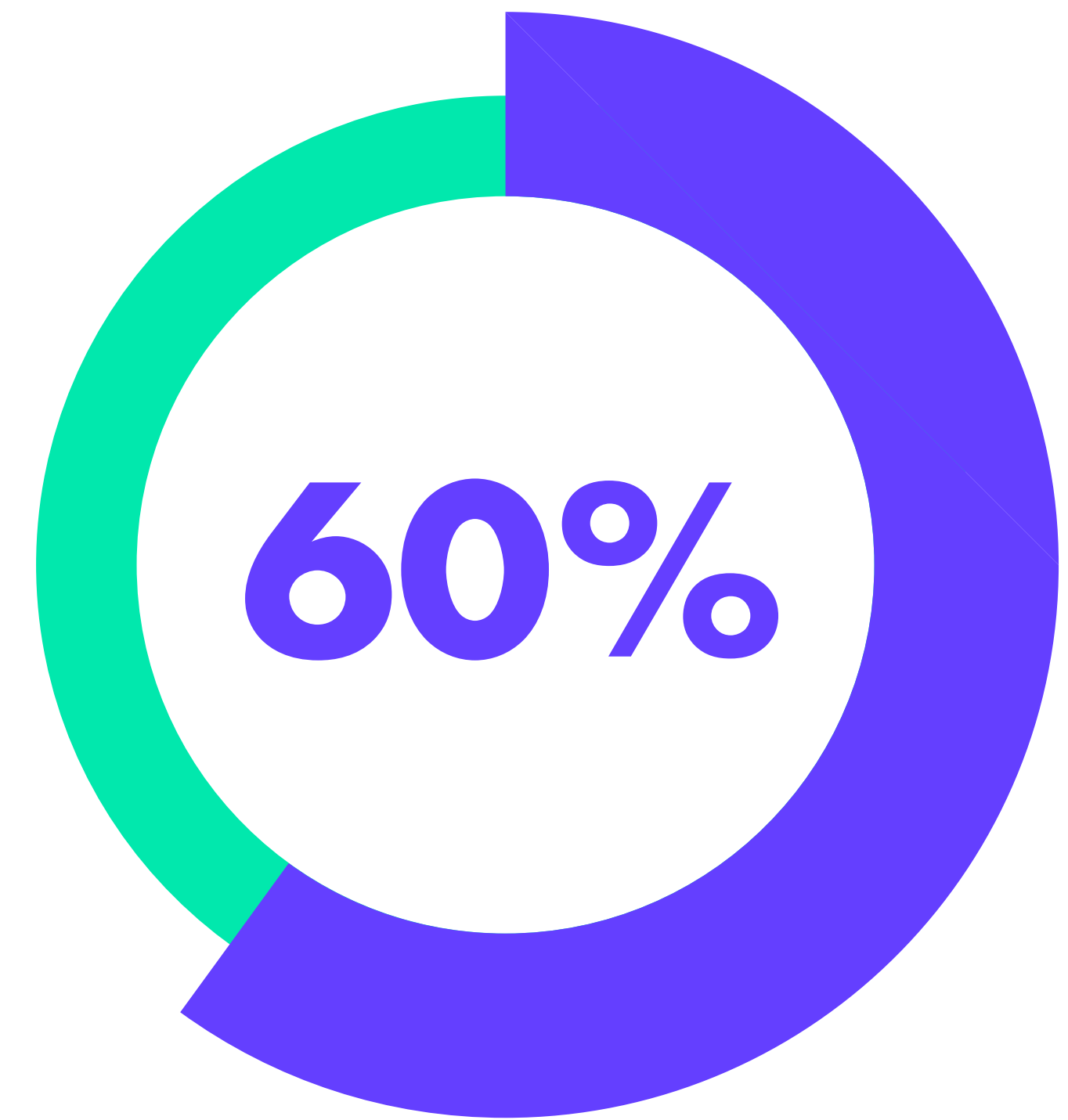


For consumers, good representation includes advertisements that have a sense of **UNIVERSAL EMPATHY AND REALISM**, with LGBTQ people taking part in human, **AUTHENTIC** stories everyone can relate to. Comparatively, using known LGBTQ celebrities is the least important factor to consumers when it comes to inclusive advertising.



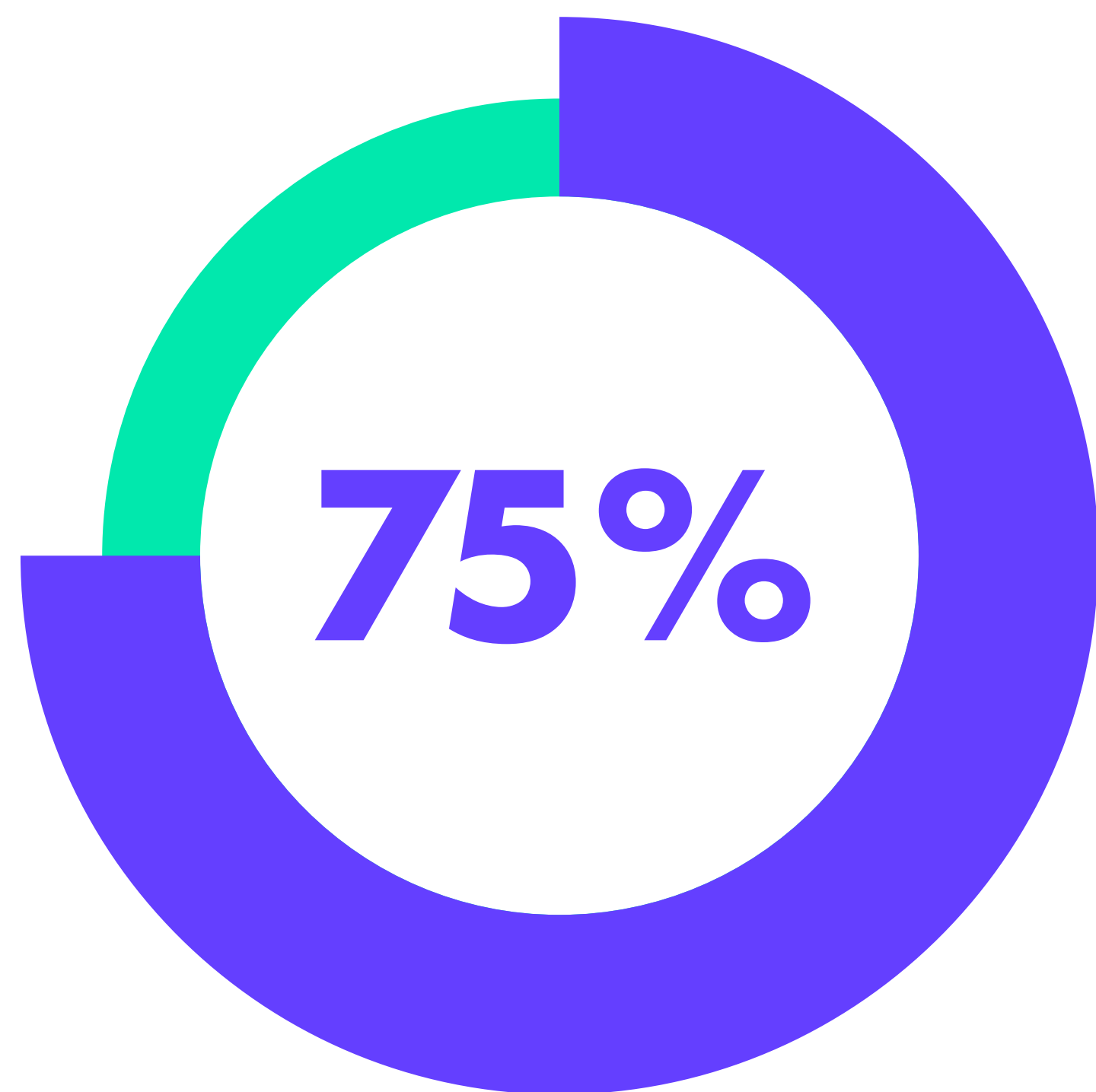
4 Responsibility to Inclusion

Over the last two years, our [Accelerating Acceptance research](#) has found that support for the LGBTQ community is steadily growing, particularly among non-LGBTQ adults over 18. This year, we learned that 84% of non-LGBTQ people have said they support equal rights for the LGBTQ community. That consistent growth in support means that media exposure is crucial to continue driving familiarity and acceptance. Consumers expect advertising and media to reflect the diversity of the world around them, and believe in the impact representation can have on changing hearts and minds. In fact, our 2023 Accelerating Acceptance research found that 60% of non-LGBTQ people believe seeing the LGBTQ community in advertising makes them more comfortable with people that are different from them.



of non-LGBTQ people believe seeing the LGBTQ community in advertising makes them **MORE COMFORTABLE with people different from them**

● Disagree ● Agree



**Americans continue
to be **COMFORTABLE**
seeing us in ads**

● Uncomfortable ● Comfortable

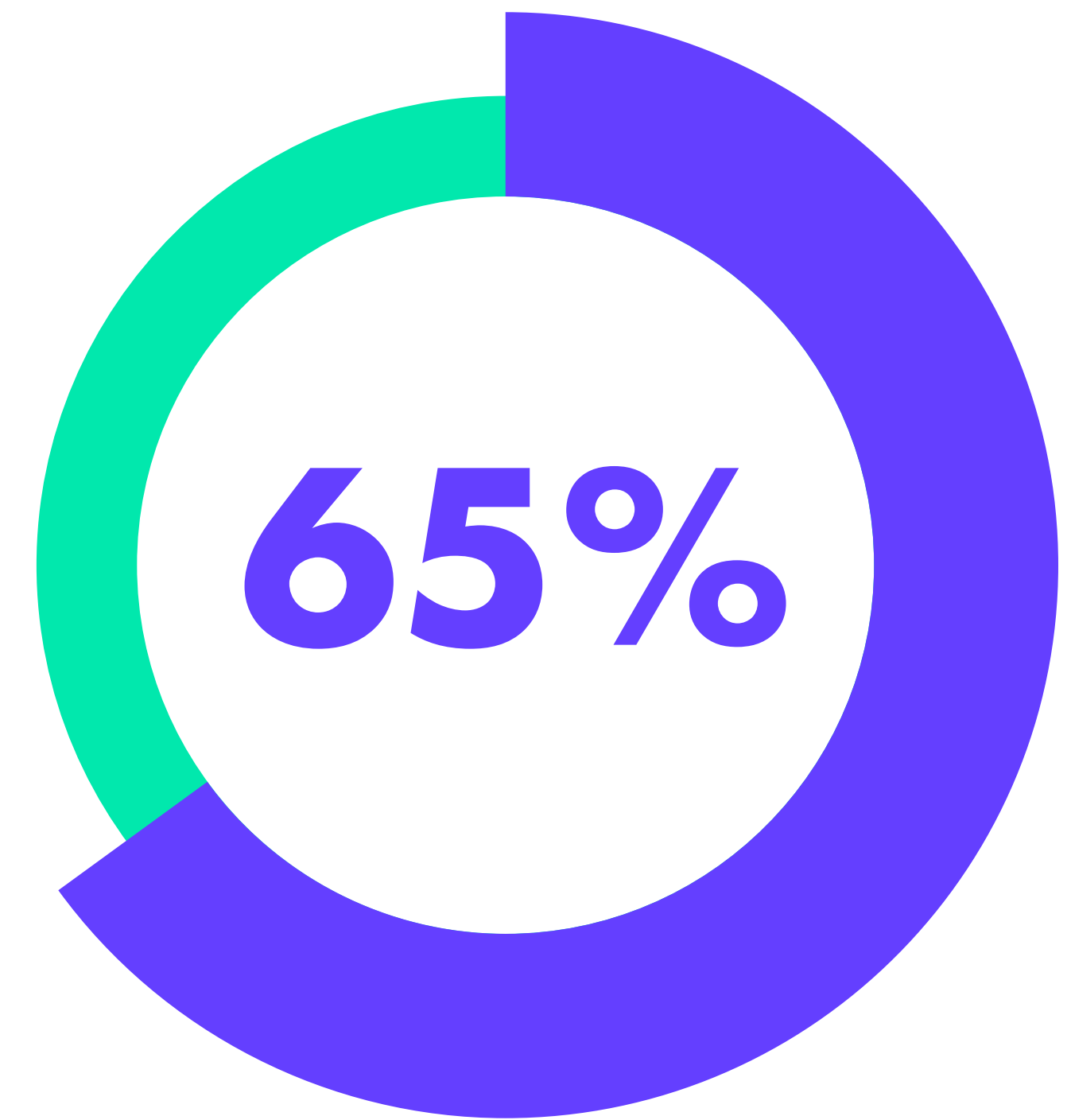
**Two-thirds of Americans feel advertisers
have a responsibility to **GIVE VISIBILITY**
within their content for LGBTQ individuals,
couples, families, and communities**



● Disagree ● Agree



And positive sentiment is not limited to advertising. 73% of non-LGBTQ consumers said that they're comfortable seeing an LGBTQ character depicted on screen in a movie or TV show, while 65% of them said they have a similar level of comfort when it comes to their children seeing LGBTQ people on social media. Brand responsibility and allyship is key in advertising—comfortability is high and brands have the opportunity to reach people that otherwise would not become familiar with the community. That acceptance can drastically impact lives.



of non-LGBTQ consumers are
COMFORTABLE with their children
seeing **LGBTQ** people on social media

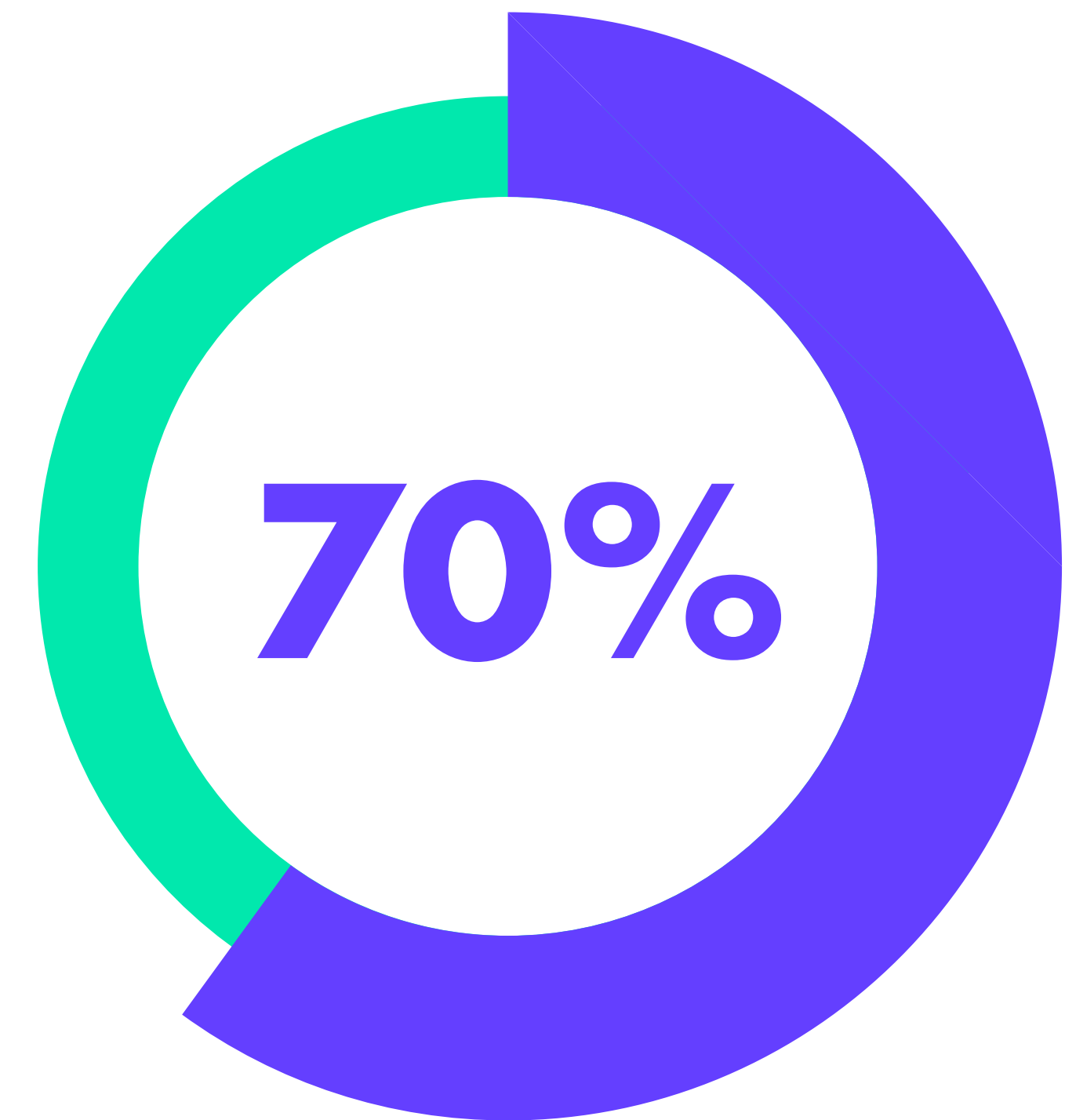
 Uncomfortable  Comfortable

5 LGBTQ Celebrity

There was a time when LGBTQ representation was virtually nonexistent in ads, and although media has progressed in trying to be more inclusive, many brands are resulting to celebrity. 70% of the ads reviewed from top spenders with the GLAAD scorecard included celebrities without overt storytelling.

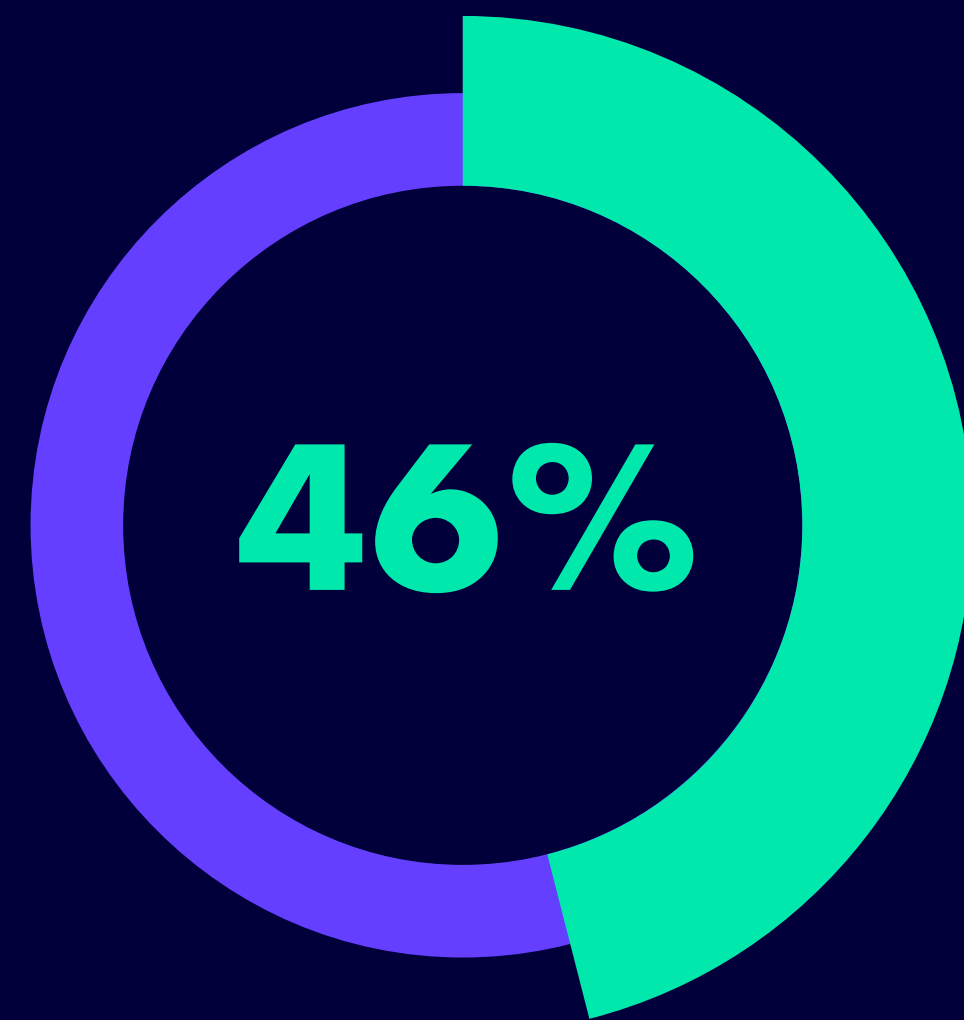
Of this year's inclusive Super Bowl ads—all of which included celebrities—a little under 40% of respondents in our consumer survey with Kantar were able to call out the inclusion. This is despite nearly two-thirds of respondents stating that current LGBTQ representation is explicit enough to be noticed by most people. Consumers expect to recognize inclusion, but are not currently clocking LGBTQ celebrity as a version of LGBTQ inclusion.

When brands include known LGBTQ celebrities in their content, there is an opportunity to develop more multi-dimensional stories about or around them in order for consumers to recognize ads as inclusive.



**of LGBTQ inclusive ads
GLAAD reviewed included
KNOWN LGBTQ CELEBRITIES,
though this is the
LEAST IMPORTANT FACTOR
to consumers**

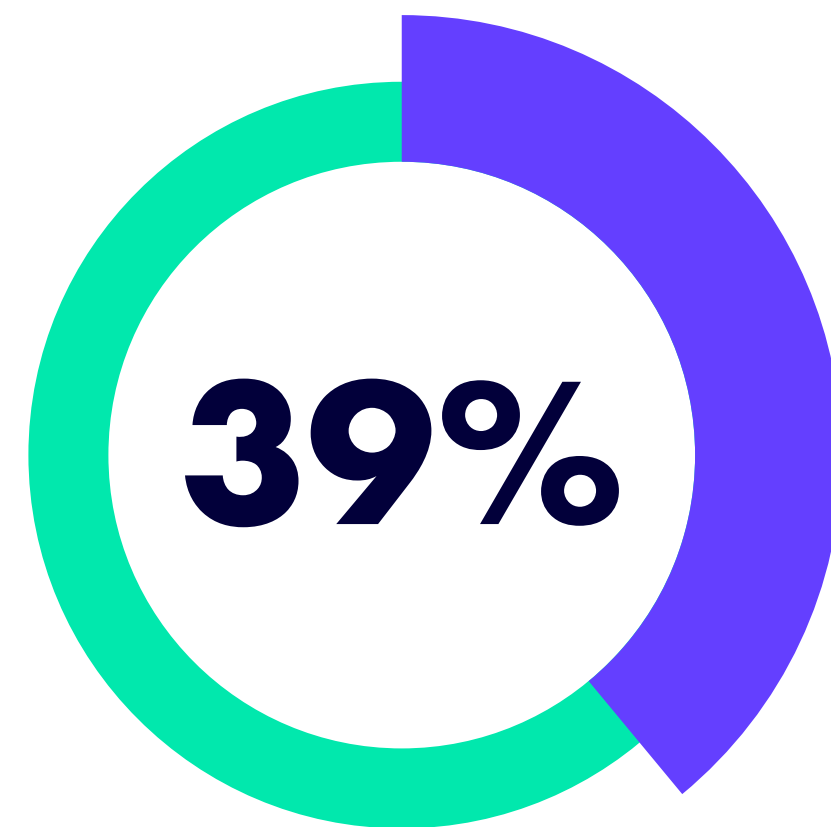
Survey participants in the Kantar study watched five inclusive Super Bowl ads from GM/Netflix, Doritos, Google Pixel, Rakuten, and McDonald's. All ads used LGBTQ celebrities, but the ad that received high respondent recognition was the only ad that featured LGBTQ content beyond the celebrity inclusion. 74% of respondents saw LGBTQ inclusive content in the McDonald's ad, and on the opposite end of the spectrum was 7% of people who saw LGBTQ representation reflected in the GM/Netflix ad. In that spot, many did not recognize Jonathan Van Ness and Antoni Porowski, though they gained popularity from Netflix's *Queer Eye*. The three additional celebrity spots also didn't reach majority awareness: 40% of people saw LGBTQ representation in the Rakuten ad, 39% in Google Pixel's spot, and only 37% in Doritos' ad, which featured the most prominent LGBTQ celebrity of the bunch, Elton John.



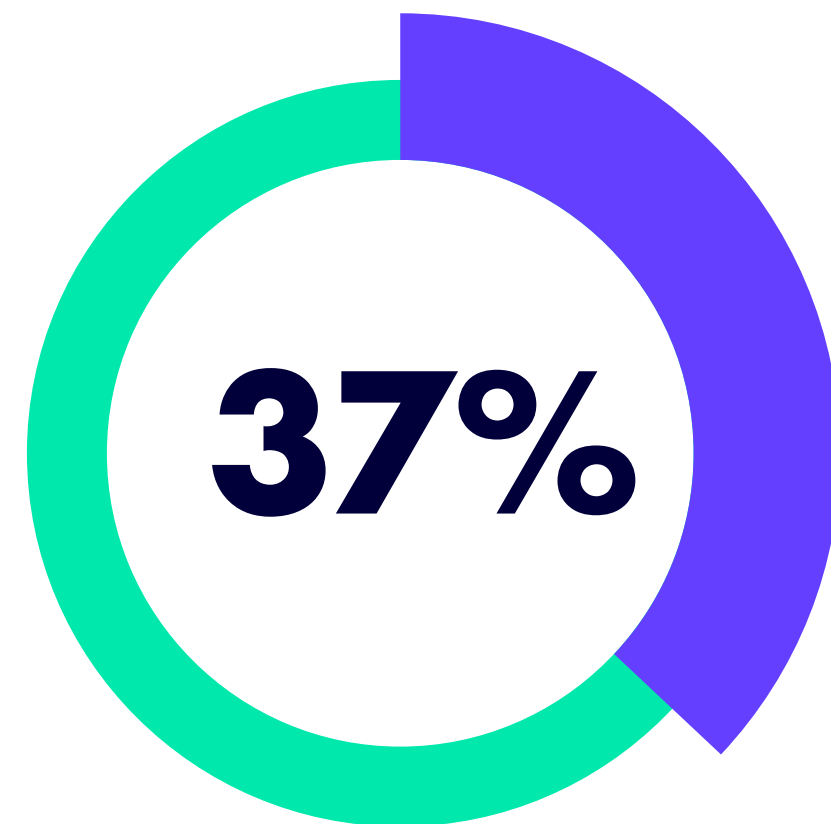
**of Gen Z say LGBTQ representation
in advertising is **TOO AMBIGUOUS**
to be noticed by most people**

When we asked people from different age groups to choose whether they thought that current LGBTQ representation in advertising is too ambiguous to qualify as a proper depiction of the community or explicit enough to be noticed by most people, it turns out that matures and boomers had a more optimistic view of it compared to Gen X, millennials, and Gen Z. While 73% of matures and 71% of boomers, respectively, said that LGBTQ representation is explicit enough to be recognized, only 63% of members in both Gen X and Millennial age groups, as well as 54% of Gen Z, were in agreement. On the flip side, 46% of Gen Z actually sided with the belief that LGBTQ representation in advertising is too ambiguous. As brands seek to reach future consumers, particularly Gen Z, the queerest generation to date, cutting through ambiguity is paramount for consumer recognition.

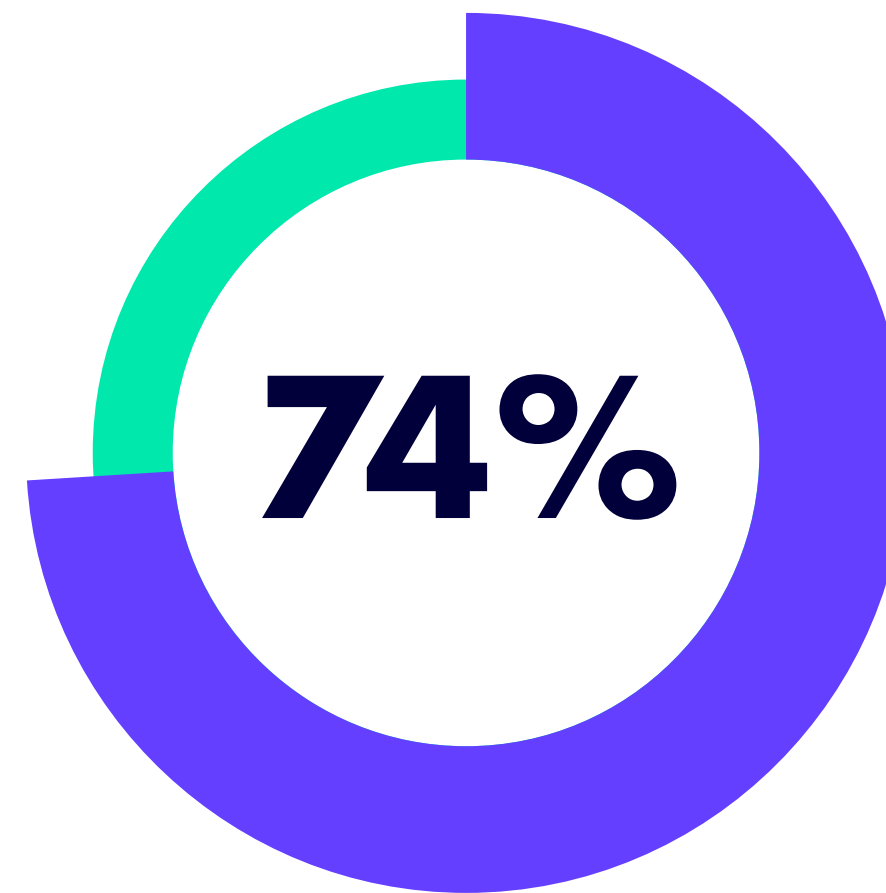
Consumer recognition of the **LGBTQ INCLUSIVITY** present in 2023 Super Bowl ads



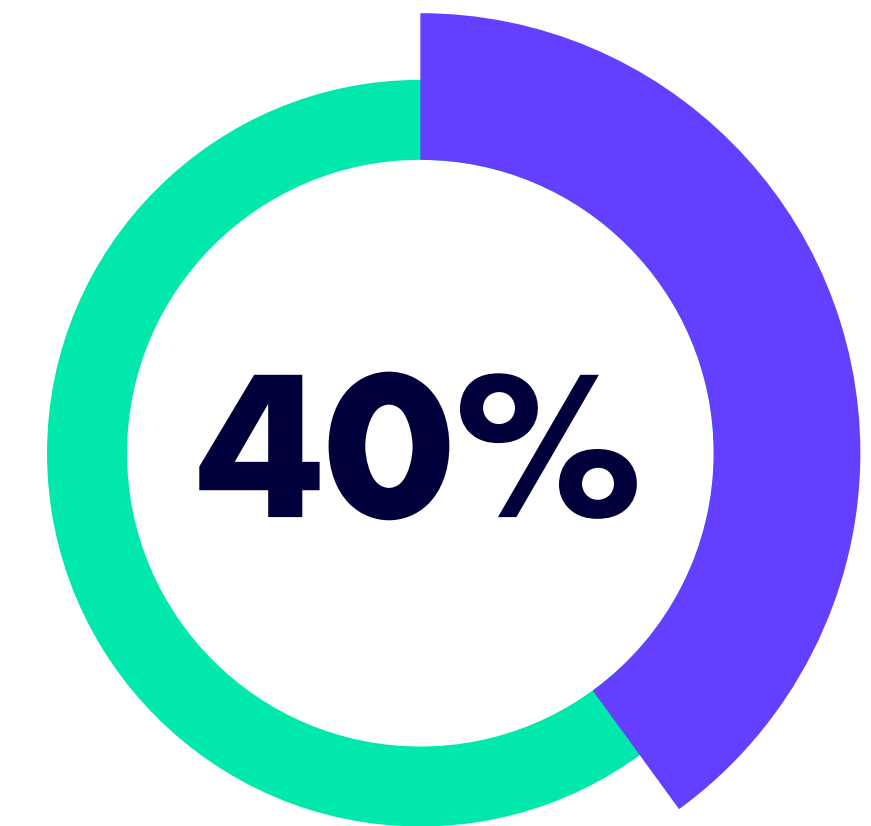
GOOGLE



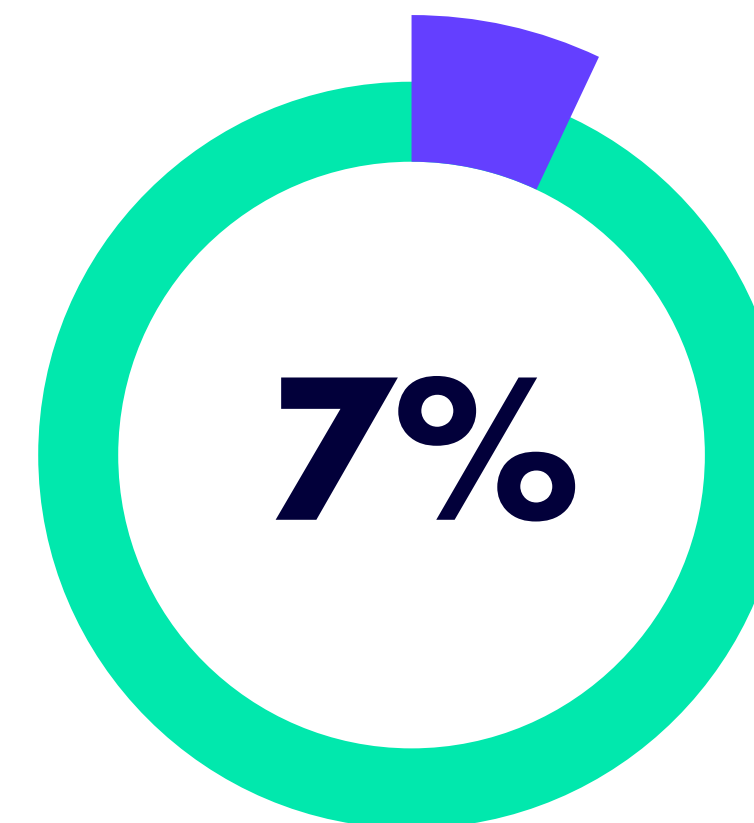
DORITOS



MCDONALD'S



RAKUTEN

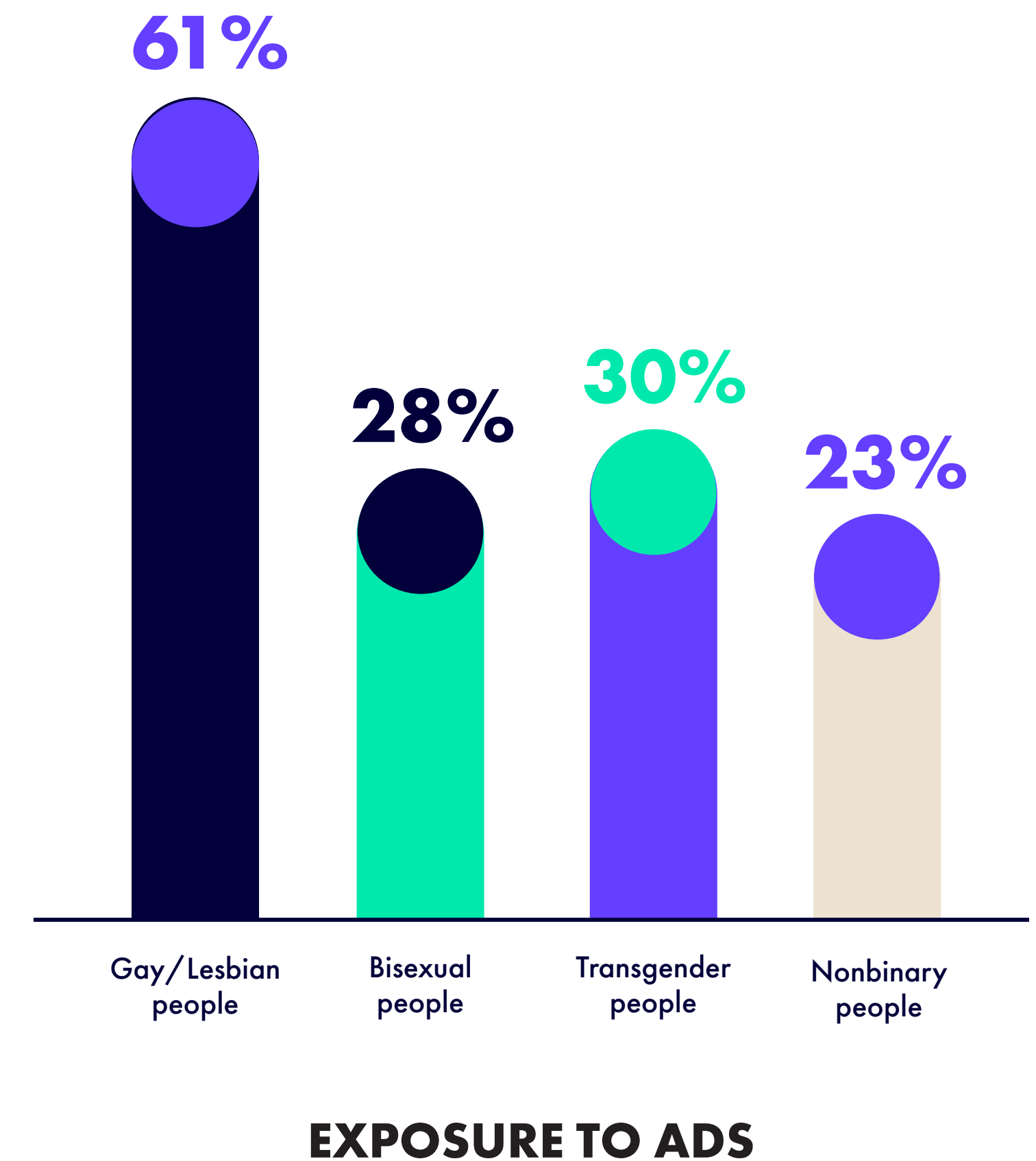


GM NETFLIX

6 Brands are Missing the Halo

When looking at overall LGBTQ representation from a wider lens, only about a quarter of people believe that gender identity and sexual orientation is underrepresented in mainstream media. And although our Accelerating Acceptance research has found that 61% of people say they've recognized gay and lesbian people in ads, there's been less exposure to bisexual, transgender, and nonbinary people at 28%, 30%, and 23%, respectively. Meanwhile, exposure in television and movies is a bit higher, but not all that different: 69% of people said they've been exposed to gay and lesbian characters within this medium, while bisexual and transgender people are tied at 48%, respectively, and nonbinary character exposure is at 34%.

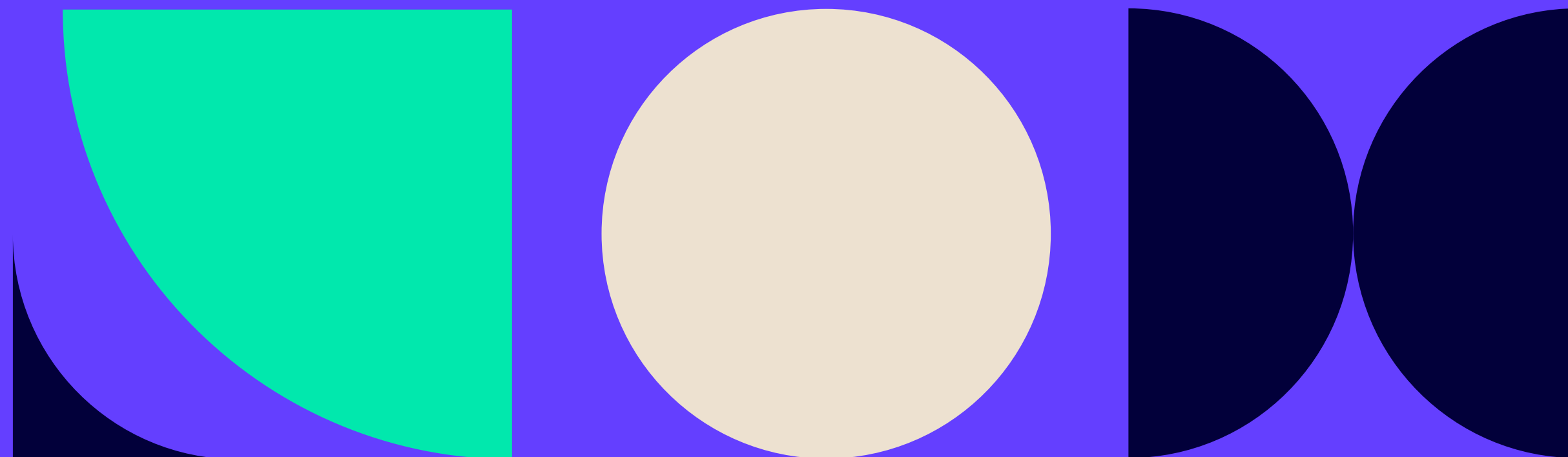
**Non-LGBTQ people see
MOSTLY GAY AND LESBIAN
people in media**



Brands and agencies have an opportunity to catch up to long-form storytelling by working towards greater visibility for bisexual, transgender, and nonbinary people.

By working towards greater visibility for LGBTQ people in advertising, brands will win. Many consumers are ready to throw their support behind pro-LGBTQ brands and the negative impact is minimal. Only 17% of people say that seeing LGBTQ representation reflected in brand advertising would bring about negative feelings. Additionally, only 16% of them would also say that they'd be less likely to purchase a pro-LGBTQ brand's products or services.

On the flip side, consumers are actually +88% more likely to think positively about a brand with a pro-LGBTQ stance and +63% are more likely to positively impact their purchase compared to negative counterparts.



**of consumers would
THINK NEGATIVELY about or
be LESS LIKELY TO PURCHASE
a brand because of
LGBTQ representation in ads**

7

Recommendations

GLAAD INCLUSION PLAYBOOK

Bring the GLAAD scorecard into brand creative conversations, starting with the initial brief. Consider where the data can shine—empathy, humanity, real and multi-dimensional representation—and ask these questions:

Is your representation casual or overt?

- Would the general consumer notice this? If the perception was two straight people, what would be the perceived relationship dynamic?
- Are you relying on gender expression cues? Will casting an LGBTQ person be the extent of inclusion or is representation baked into the concept?

Are you using iconography or known LGBTQ talent?

- If yes, consider ways to expand the story for greater consumer awareness
- Are LGBTQ people doing everyday activities?
- Is this relatable and grounds the LGBTQ people into reality?

Is the content universal?

- Can non-LGBTQ people see themselves represented here?
- Are there themes of relationship, community, or experience that are human?

Is intersectional representation present?

This includes ability, age, body size, ethnicity, faith, geography, race, socioeconomic status, and more.

Is the narrative focused on a non-LGBTQ person responding/reacting to the existence of an LGBTQ person?

Avoid making LGBTQ people the punchline or seemingly needing to validate their existence.

How much time or space is given to the LGBTQ person, experience?

Provide at least 10% time to the LGBTQ person or story, ideally much more!

Is the content in major media and/or shared to a broad audience?

The brand halo comes from non-LGBTQ people; don't limit LGBTQ inclusive content to LGBTQ audiences.

Is the content airing in June?

If yes, is this a longer campaign? Are there other moments where LGBTQ people are included throughout the year, not exclusively on awareness/celebration days?

Is the content sensationalizing an LGBTQ person's experience?

If yes, this is unlikely to capture the most important values of empathy and humanity from the consumer.



KNOW YOUR BRAND

LGBTQ inclusivity is not one-size-fits-all. Determining who and how to feature LGBTQ people in marketing requires an understanding of your brand mission, values, consumers, and opportunities for growth. LGBTQ content cannot live outside your core brand, it needs to blend in with the rest of your content.

STAND BEHIND YOUR PARTNERSHIPS

When you commit to LGBTQ inclusion, prepare the corporate response to backlash in advance. The majority of non-LGBTQ people are supportive of inclusive advertising, but even small demands for boycotts can be amplified. Prepare for the pushback, determine what to say and by whom, create a timeline for response, and always reaffirm and stand behind your partnerships.

CELEBRATE PRIDE 365 AND 360

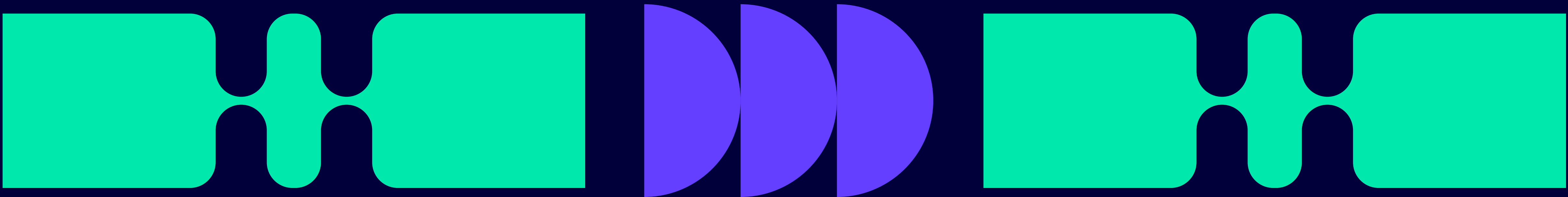
The LGBTQ community needs support and visibility year-round, and LGBTQ inclusion needs to be across multiple points of consumer contact. Include LGBTQ content in your general market campaigns year-round and don't limit your LGBTQ media buys to June. Showcase the diversity and intersectionality of the community by featuring LGBTQ stories and talent in other heritage months. Share LGBTQ content on your owned platforms, not only in paid media or exclusively via influencers.

Extend all campaign support into LGBTQ-owned and operated media. These platforms are vital to the community, elevating important news and creating safe spaces. When expanding campaigns beyond Pride and beyond LGBTQ audiences, don't sacrifice these platforms.



MIRROR YOUR BRAND VOICE WITH INTERNAL PRACTICES

Consumers are increasingly paying attention to brand values and may choose to stop purchasing from brands that aren't practicing inclusion. Back up marketing with LGBTQ inclusive and protective company policies and culture; leadership that demonstrates respect for LGBTQ clients, employees, and prospective users; corporate donations to non-profits, political causes, and politicians themselves that support your values; speak up when LGBTQ people are under attack; show consumers where you are directly providing community support.



TEST CONTENT TO ENSURE LGBTQ VISIBILITY

Consumers may need additional storytelling, time, or awareness to recognize LGBTQ inclusive content. If you're looking for the halo effect with inclusion, consumers have to be able to see it. Testing in advance can provide a greater guarantee of consumer awareness if the inclusion is casual or minimal.

BE AWARE OF AND STEER CLEAR OF TROPES

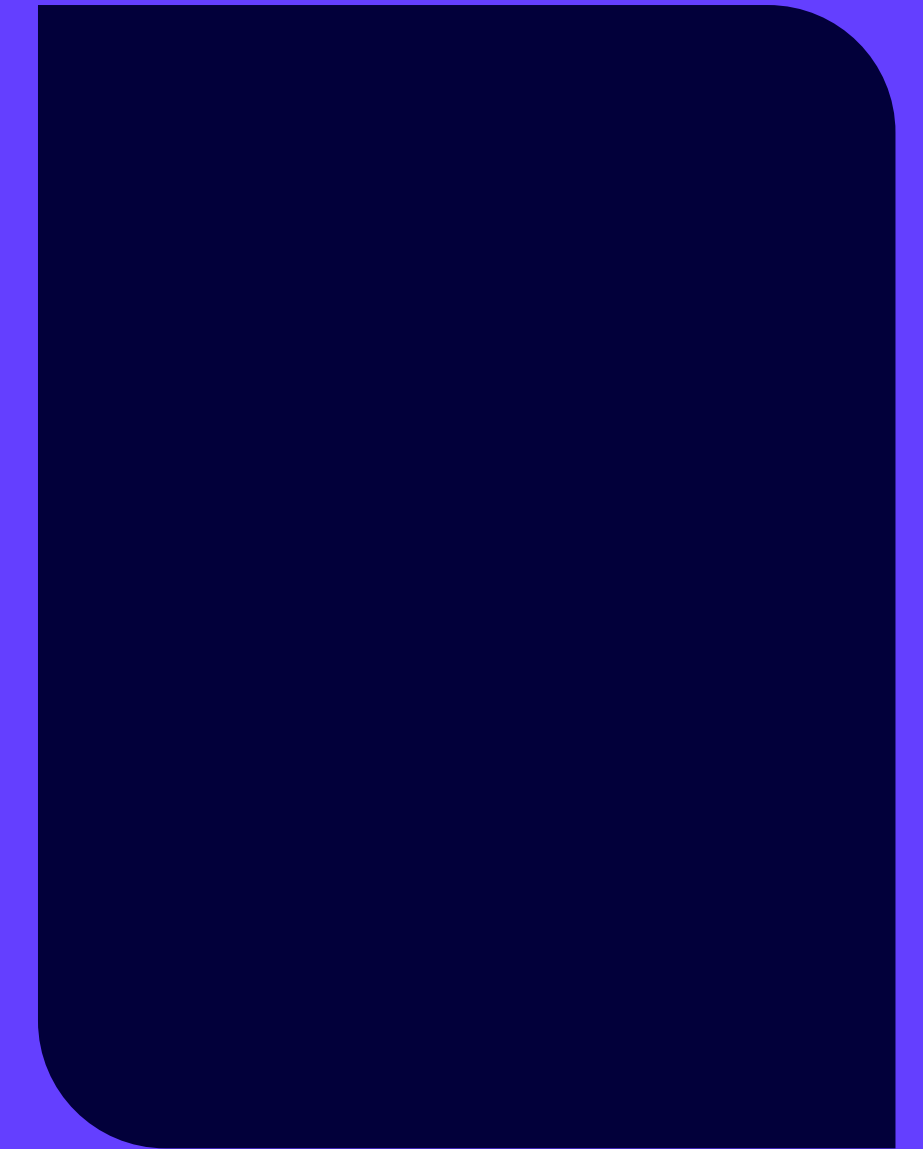
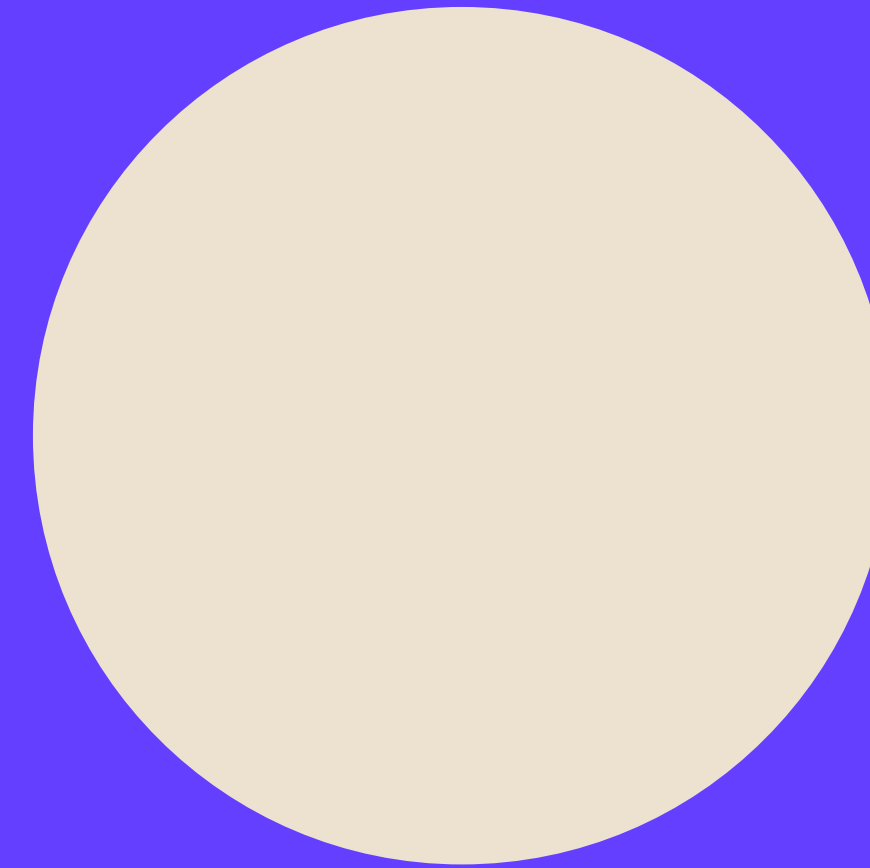
Campaigns, content, and partnerships should avoid tropes common in LGBTQ inclusive content:

- Invisibility of bisexual people
- Invisibility of transgender men
- White gay cisgender men as the standard/only representation of the community
- Prescriptive transgender trauma
- Exclusive focus on coming out
- Exclusive focus on transition

IT'S NOT IF, BUT HOW

GLAAD's team of media advocacy experts is here to serve as a strategic advisor and resource for brands seeking to improve inclusive creative and practices.

This is an opportunity for brands to meet this moment, stand behind—or intentionally build—their inclusive practices, and realize the outsized impact of their advertising. The data is clear that business growth requires LGBTQ inclusion. It's not a matter of if brands should be inclusive, but rather how they do it right.



ACKNOWLEDGEMENTS

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Brandon Parrott-Sheffer, Head of Polycultural Research, Deloitte Ethos
Christena Pyle, Chief Equity Officer, Americas, Dentsu
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Anna Wilgan, Vice President, Product Marketing
Hannah Sokolov
Andy Joyce
Sandhiya Nadarajah

METHODOLOGY

Two distinct methodologies were utilized in the development of this report. The first was the creation of GLAAD’s proprietary Advertising Visibility Index Scorecard to quantify and qualify LGBTQ representation in advertising. The second was a large-scale Visibility study on consumer perception with 1,000 U.S. Adults 18+ in partnership with Kantar.

For more detailed information on the methodology, please go to glaad.org/adindex/2023/methodology.



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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