

Attitudes Towards Inclusivity in Advertising: A Twelve Country Study



Steven Millman

Dynata



dynata[™]

Attitudes Towards Inclusivity in Advertising: A Twelve Country Study

Steven Millman

Global Head of Research & Data Science

The concepts presented in this presentation are property of Dynata, LLC.
Duplication or dissemination of the information without the express written consent is prohibited.

Research Methodology

12,043 Respondents

12 Countries

Representative Sample

18+ Adult Population

July 20 – Aug 8, 2023

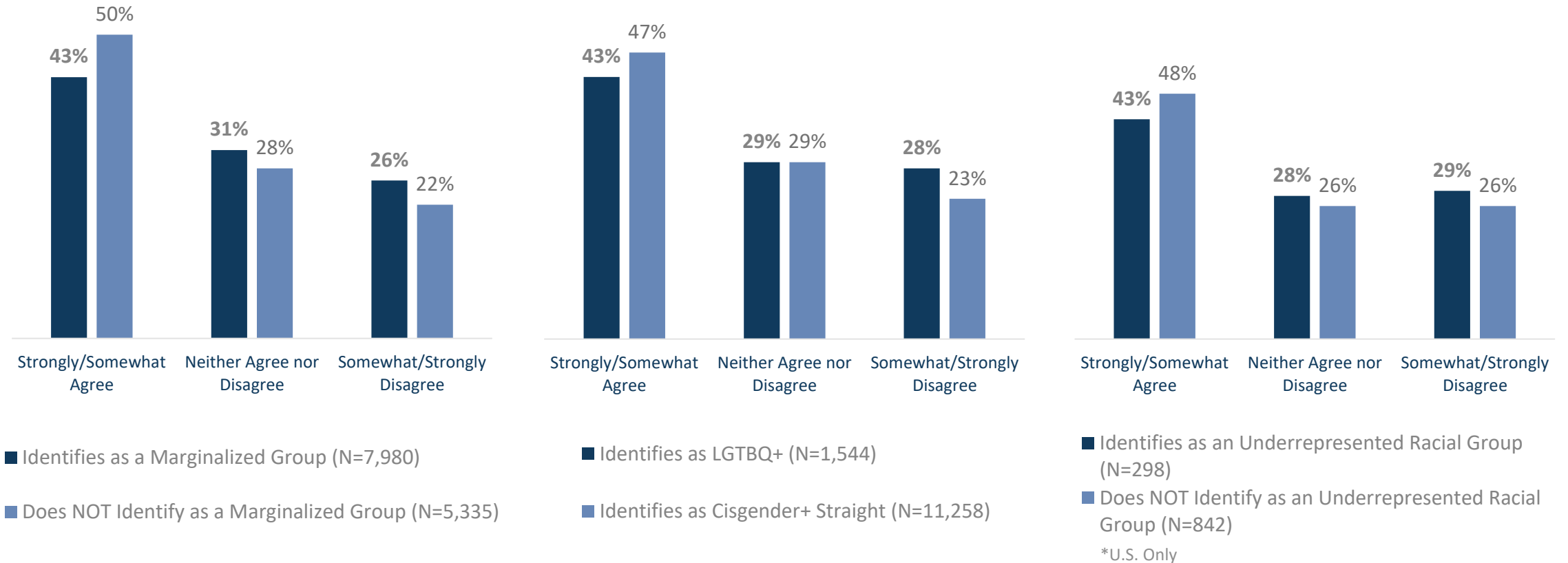
- **Countries Included**- United States, Canada, United Kingdom, Germany, France, Italy, the Netherlands, Spain, China, Japan, Australia, and Brazil.
- **Online Survey Collection** - Sampled to be representative of adult population (18+) by country.
- **Sampling**
 - US Sample was weighted to US Census targets on Gender, Age, and Income
 - All other countries were weighted to nationally representative profiles on Gender and Age.
 - Small deviations from sample quotas were corrected with weighting as needed.

Authenticity & Satisfaction of Identity Portrayal in Advertising



Perceived Authenticity in Advertising Today

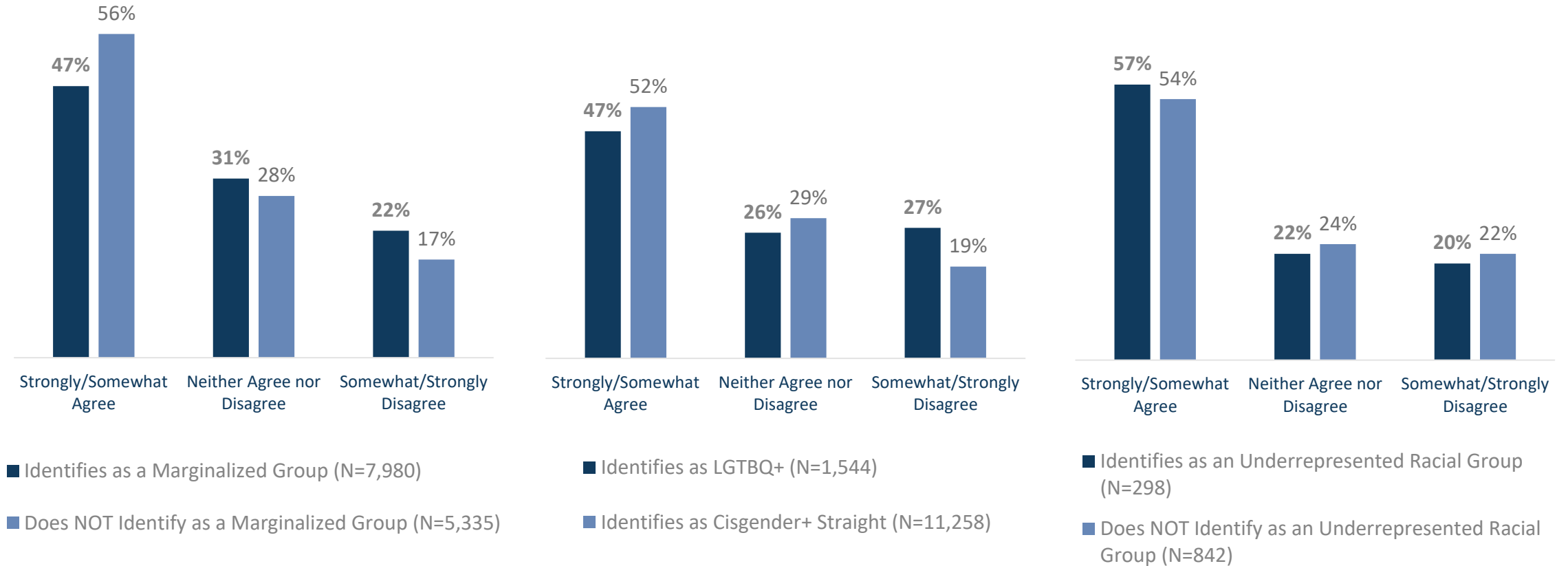
Members of minority groups generally feel somewhat less authentically represented in advertising than do others. Across the board, however, most people do not.



‘People like me are generally portrayed authentically in advertising’

Satisfaction with Identity Portrayal in Advertising

Marginalized groups and LGBTQ+ are less likely to be satisfied by their portrayal in advertising. For underrepresented racial groups in the US, there is not the same effect.

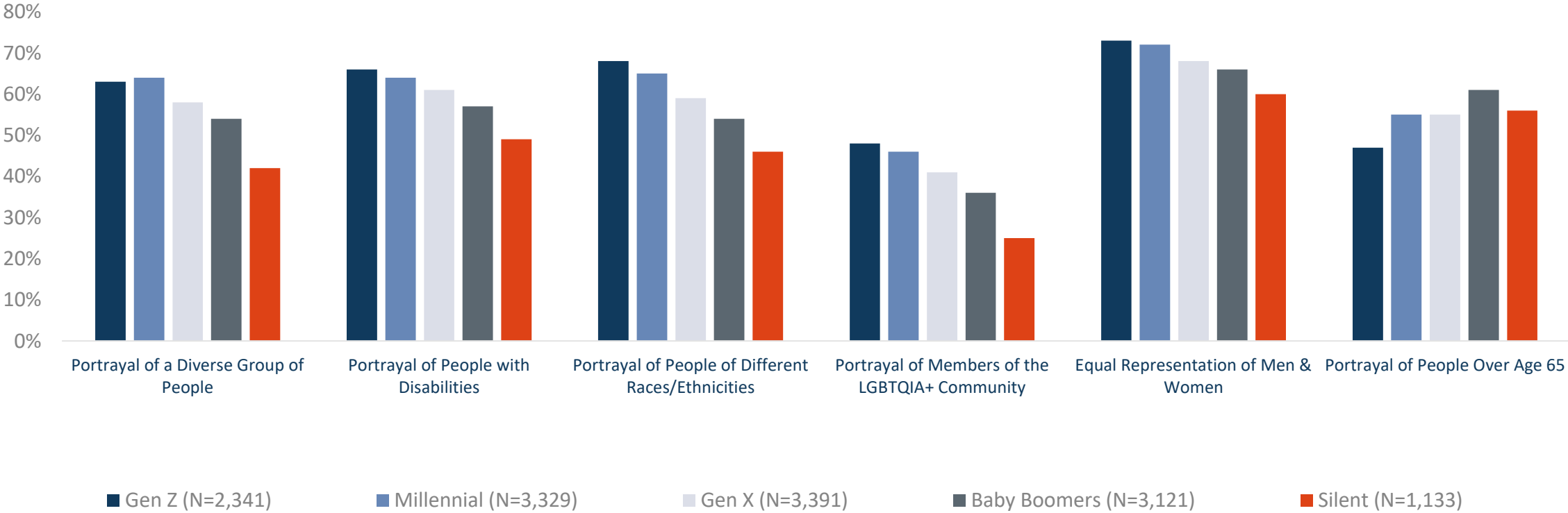


*U.S. Only

Agreement with Satisfaction regarding how Their Identity is Presented in Advertising

Importance of Inclusivity in Advertising

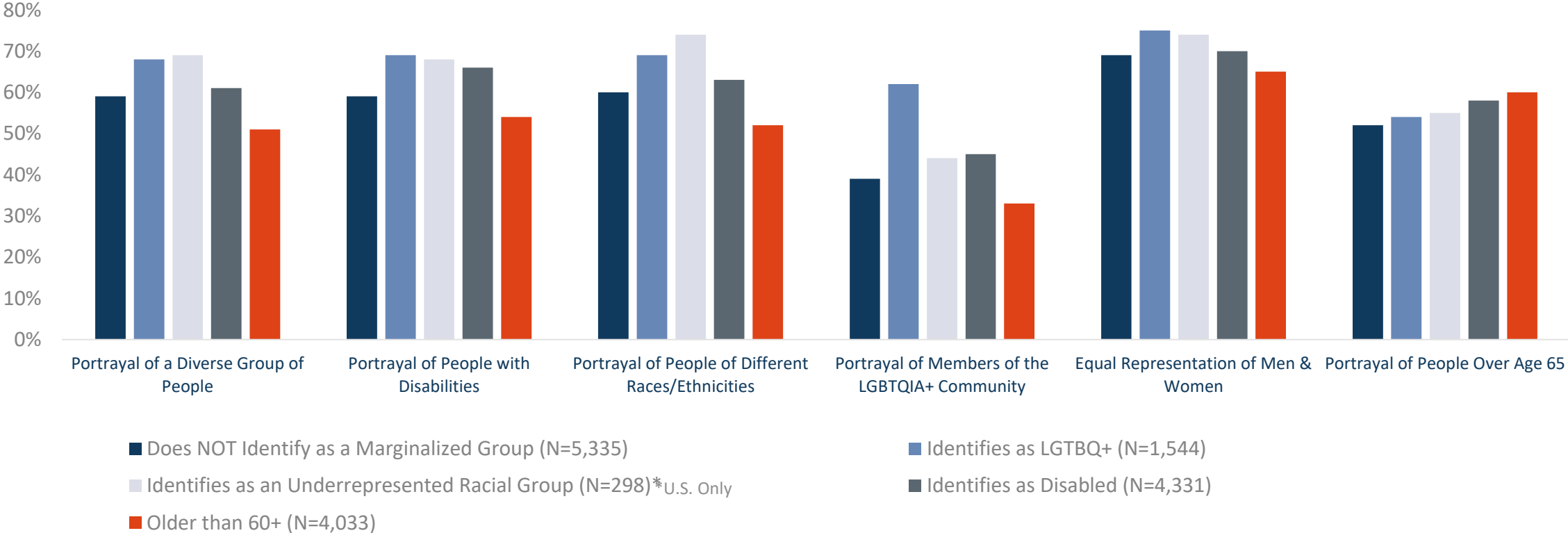
With the exception of the portrayal of people of 65, the portrayal of marginalized groups is seen as less important as people get older. LGBTQ+ have the lowest ratings of importance for inclusivity.



Respondents Reporting Portrayal of Marginalized Groups is 'Important/Very Important'

Importance of Inclusivity in Advertising

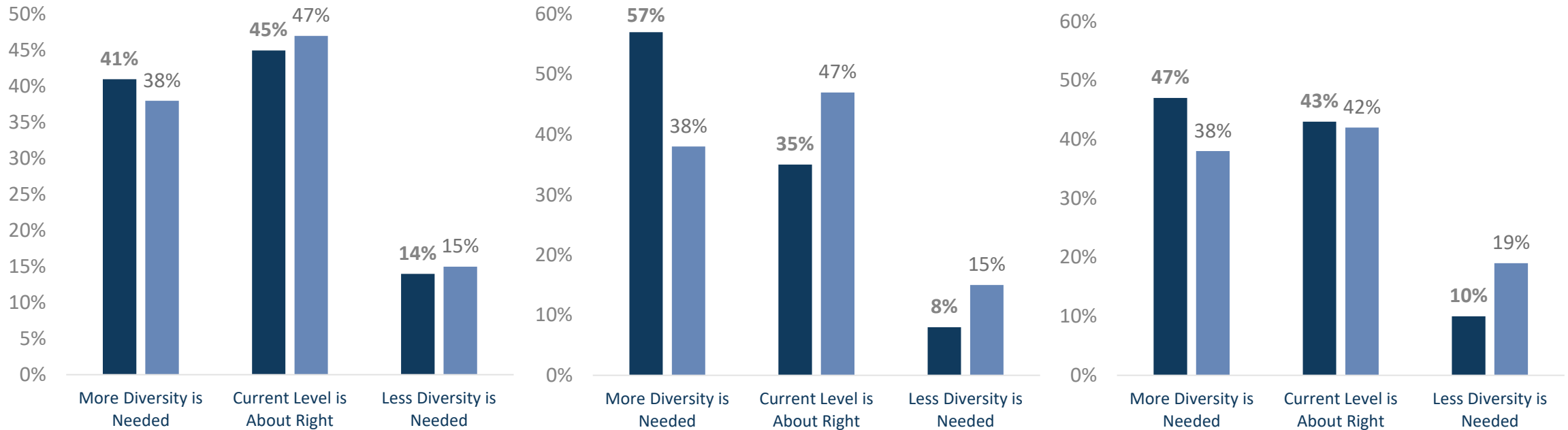
In general, portrayal of marginalized groups in advertising was less important to non-marginalized individuals and people over 60, than others. Portrayal of LGBTQ+ was important to less than half of non-LGBTQ+ respondents.



Respondents Reporting Portrayal of Marginalized Groups is ‘Important/Very Important’

Reflection on Current Level of Inclusivity in Advertising

Marginalized populations were more likely to say more inclusivity and diversity in advertising is needed than non-marginalized.



■ Identifies as a Marginalized Group (N=7,980)

■ Does NOT Identify as a Marginalized Group (N=5,335)

■ Identifies as LGBTQ+ (N=1,544)

■ Identifies as Cisgender+ Straight (N=11,258)

■ Identifies as an Underrepresented Racial Group (N=298)

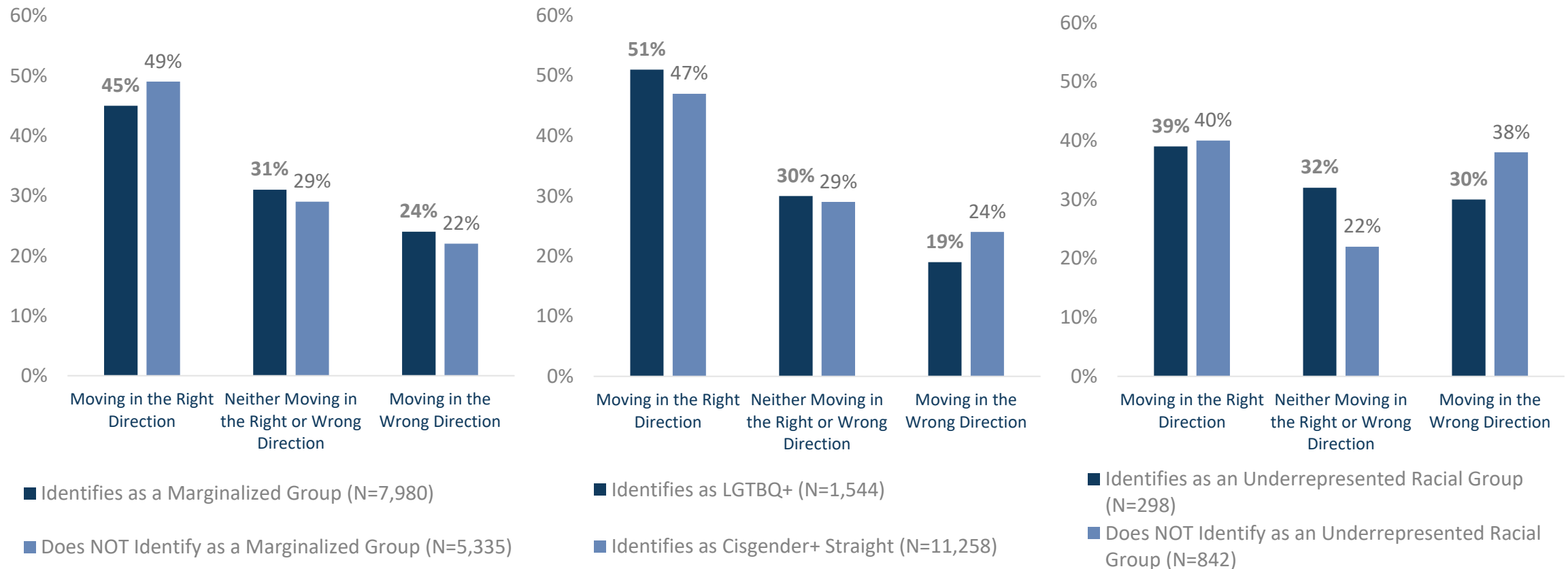
■ Does NOT Identify as an Underrepresented Racial Group (N=842)

*U.S. Only

‘Do we need more or less inclusivity & diversity in advertising?’

Societal Perception of Trending Inclusivity

Differences between marginalized and non-marginalized populations were minimal on the subject of whether things are getting better or worse with respect to inclusivity in advertising



*U.S. Only

‘Is society moving in the right or wrong direction with respect to inclusivity?’

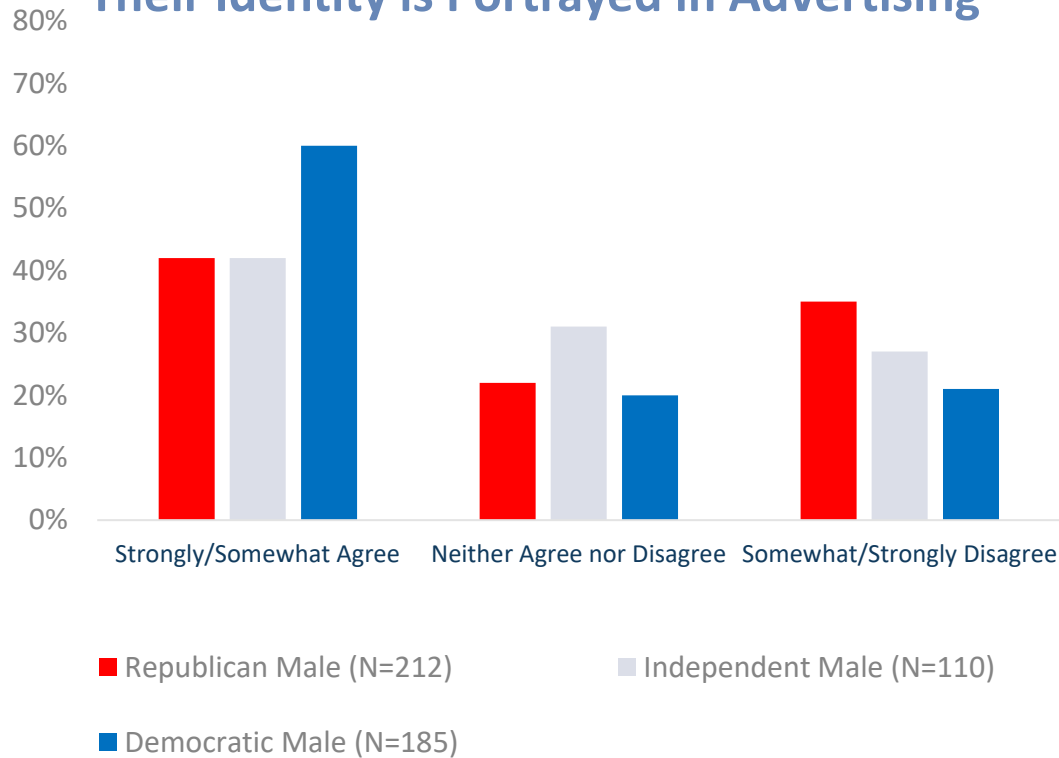
How Partisanship in the US Impacts Feelings Around Inclusivity & Diversity in Advertising



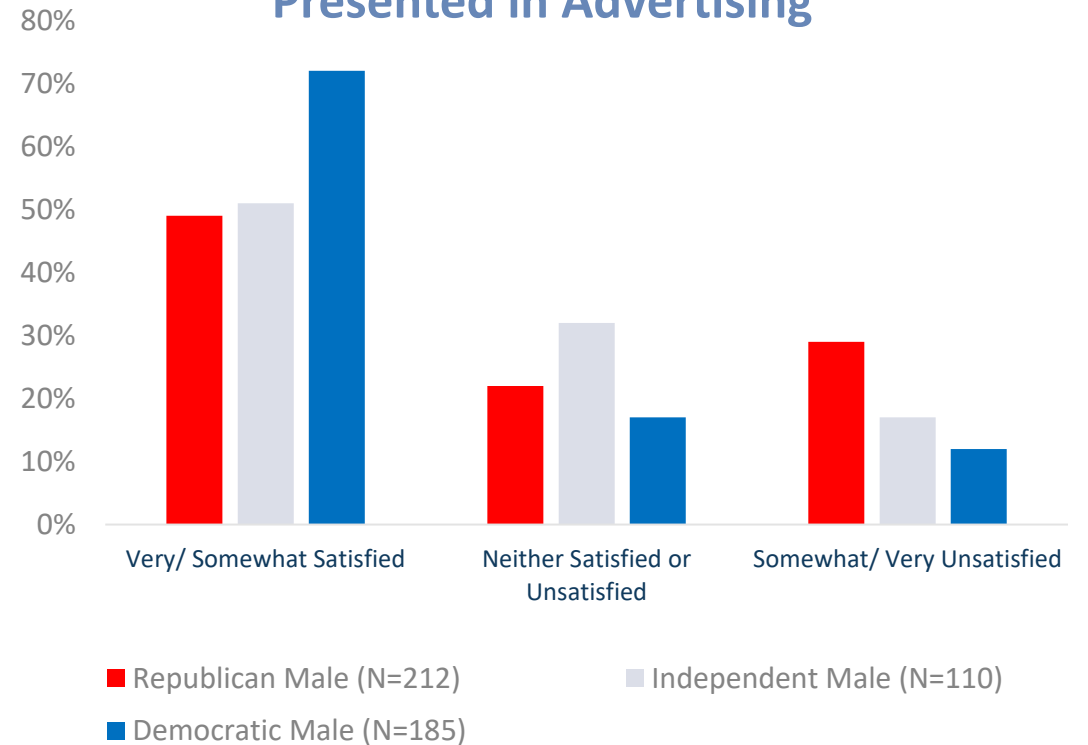
Inclusivity in advertising in the US by Party (Men)

Democratic men were much more likely than Republicans or Independents to care about and be satisfied with how authentically their identity is being portrayed in advertising

Importance regarding how Authentically Their Identity is Portrayed in Advertising

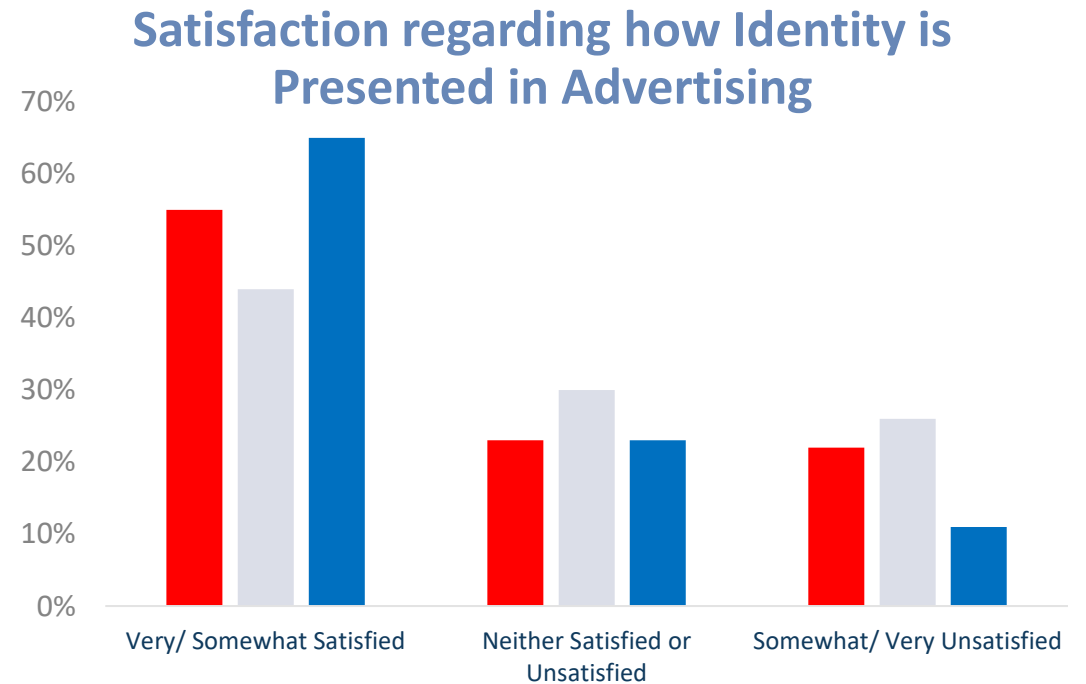
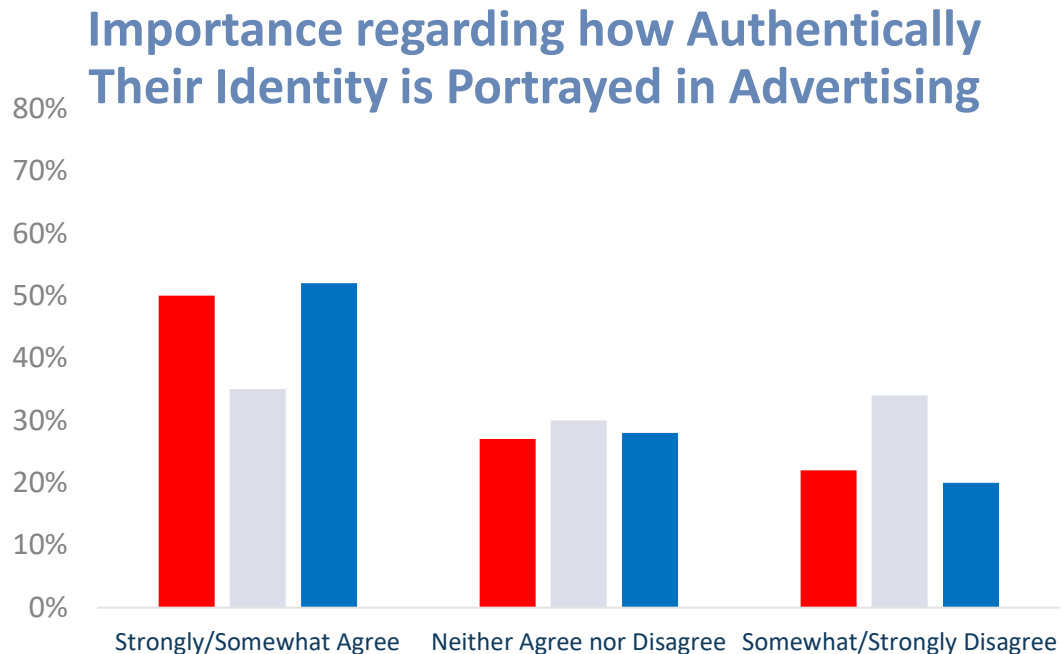


Satisfaction regarding how Identity is Presented in Advertising



Inclusivity in advertising in the US by Party (Women)

Democratic AND Republican women were much more likely than Independents to care about and be satisfied with how authentically their identity is being portrayed in advertising.



■ Republican Female (N=172)

■ Independent Female (N=126)

■ Democratic Female (N=223)

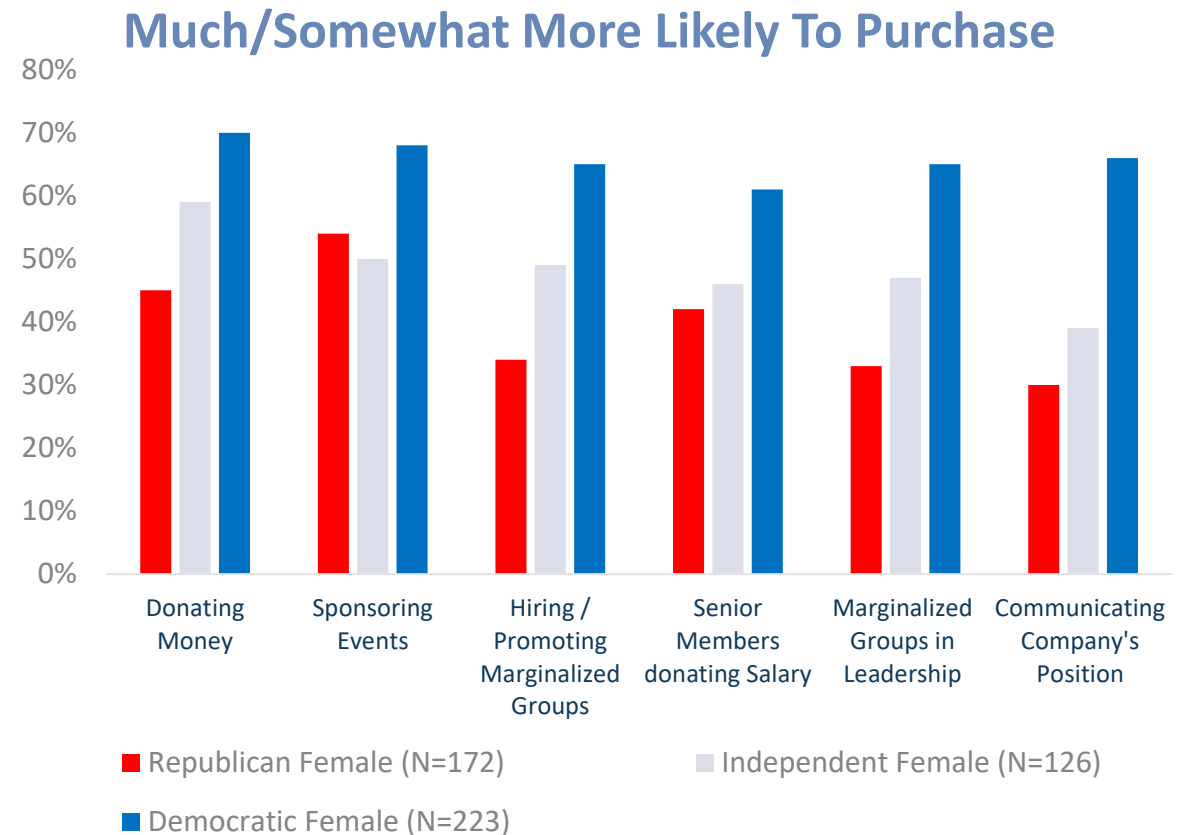
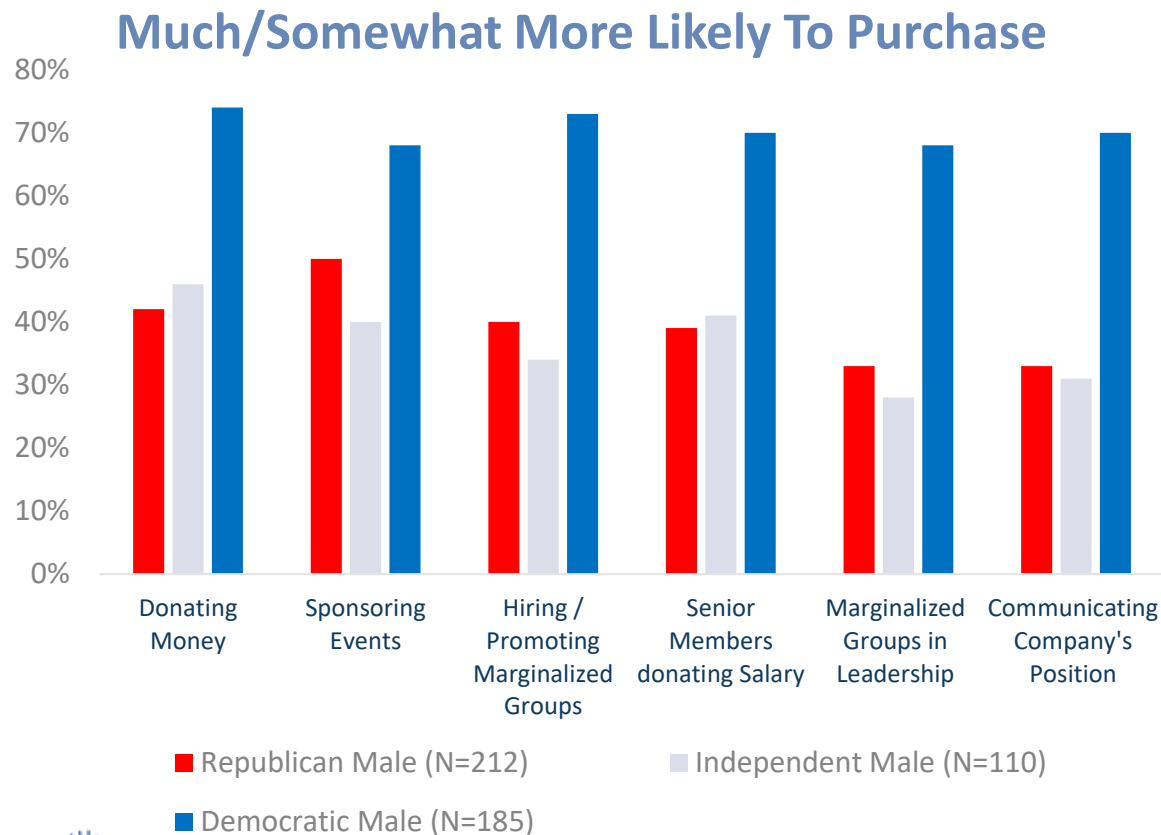
■ Republican Female (N=172)

■ Independent Female (N=126)

■ Democratic Female (N=223)

Effect of Inclusivity & Diversity on Purchasing Behaviors in the U.S. by Party and Gender

Democratic men were much more likely than Republican or Independent men to say that they would be more likely to purchase from inclusive advertisers. The difference between Democratic, Republican, and Independent women were similar but much closer.



Country-Specific
Attitudes:
Most Countries
Behaved in
Much the Same
Way Except...



Brazil Led Perception of Importance of Inclusivity across Marginalized Groups

Respondents Reporting that Portrayal of Marginalized Groups are 'Very Important/Important'

