



2024 REPORT

# LGBTQ+

# ADVERTISING

— AND —

## BRAND EXPERIENCE

Showing up with integrity during Pride Month



# A new era for purpose-led marketing

Last year, Pride Month was defined by legislative battles, a contentious media cycle, and violent protests at stores, parades, and other Pride-related events. Brands faced backlash for supporting the LGBTQ+\* community... and then again for backtracking on their original stance. Some stayed silent through it all, abdicating their power to further LGBTQ+ visibility in the US. Others released campaigns through year-end despite the risk of boycotts, recognizing an equal risk in abandoning such marketing.

The spectrum of marketer responses underscores the need to define what role people expect organizations to play during Pride Month and year-round. There is no escaping the gravity of last year's events. Looking ahead to a divisive presidential election and beyond, how can brands support the LGBTQ+ community with integrity and impact, while still accounting for disproportionately loud "anti-woke" pressures?

Featuring insights from 6,000+ consumers, DISQO and Do the WeRQ partnered on this fourth annual report exploring LGBTQ+ advertising and its impact on brand experience. Our [2023 report](#) examined consumer opinions regarding boycotting and "wokeness." This year, we set out to determine where Pride stands in the wake of these controversies during an eerily quiet year.

We offer insights to suggest how brands can align their marketing efforts with consumer expectations. We also examine shifts in consumer recall and receptivity to LGBTQ+ advertising, along with perceptions of brand influence. These year-over-year comparisons offer valuable benchmarks for understanding how the industry is adapting. They also reveal how the fear of backlash and boycotts is shaping perspectives in 2024.

\*LGBTQ+ is an abbreviation for [LGBTQQIP2SAA](#), which stands for lesbian, gay, bisexual, transgender, queer, questioning, intersex, pansexual, two-spirit, asexual, and allies. These terms refer to a person's sexual orientation, gender identity, or gender expression.

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## Methodology

DISQO surveyed 6,532 US adults from our first-party audience, between May 3-9, 2024. Twelve percent of respondents (n= 784) identified as LGBTQ+. More than 2 million people have opted in to share their brand experiences with DISQO, empowering clients to cultivate deep insights about their target audiences and to perform objective, single-source measurement of advertising effectiveness on attitudes and digital behaviors. The survey informing the report insights was fielded to a balanced sample of US adults on age, gender, income, and ethnicity. The data was also weighted on age, gender, and income.



# The power of brand integrity for LGBTQ+ visibility



**MEGAN PUGH**

*Creative Director & Beyond Boundaries Employee Resource Group (ERG) Lead*



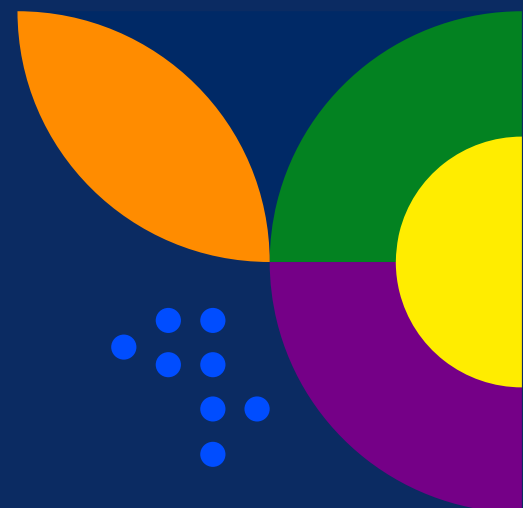
Brands today are more than just their products or services; they are key players in societal discourse. As a queer Creative Director, I often handle the hows and whys for brands' efforts to shape conversations and drive change. I've learned that brand integrity is not only crucial for long-term success and cultural growth but also for the bottom line.

Last summer, the large-scale blowback against brands who backtracked their LGBTQ+ allyship sent a message that their support is conditional and fragile. It also undermined the trust and loyalty already garnered from the LGBTQ+ community, its allies, and more supportive younger generations.

In the marketing funnel, consistent support and brand integrity are key to nurturing long-term relationships that drive return purchases and foster a loyal customer base of brand advocates. The LGBTQ+ community wields [\\$3.9 trillion in annual global spending power](#). Brands that demonstrate unwavering and unconditional support can harness this power, solidify their role as a true ally, and symbiotically bolster profits – especially in a year where brands may be more reticent to publicly voice their support.

Marketers have a wide range of actions available to them when it comes to allyship – from advertising to donations to workplace support. In fact, our 2024 research reveals that consumers feel workplace policies and LGBTQ+ support outside of Pride Month are the most important actions they can take.

As the lead of DISQO's Beyond Boundaries diversity, equity, and inclusion (DEI) ERG, I can attest firsthand to the importance of creating and leading change in smaller spaces and within our day-to-day work. Our conversations and learnings are catalytic for our personal growth and for a larger, sympathetic unanimity that will foster new levels of diversity and visibility standards in marketing.

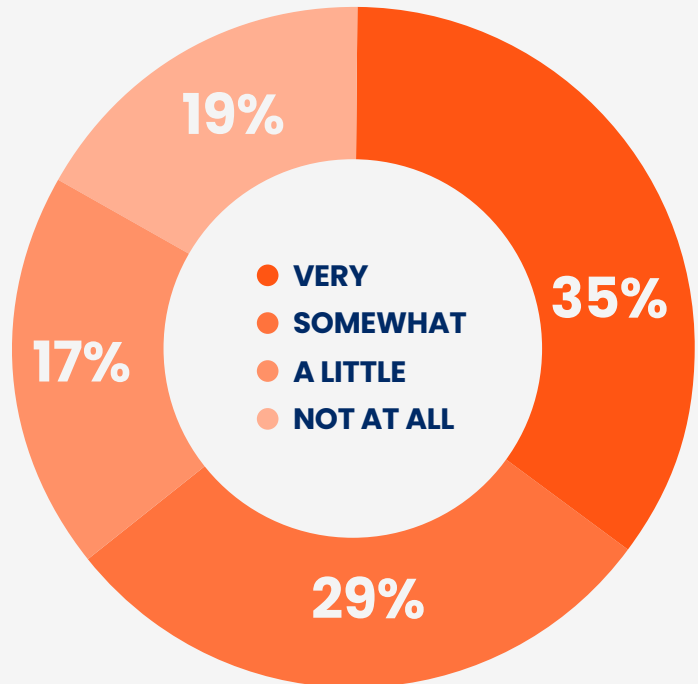


# Pride is a mainstream affair

Pride represents an important opportunity for brands to raise their voices in discussions of inclusion and equality, creating connection and favorability with the LGBTQ+ audience. It's a moment for marketers to reach and resonate with allies who share these values. For this reason, we set out to gauge overall awareness of Pride among consumers and understand how much they notice displays of support.

## WE ASKED

**June is national LGBTQ+ Pride Month. Prior to this survey, how aware were you of Pride Month?**



**60%**

**GEN POP**

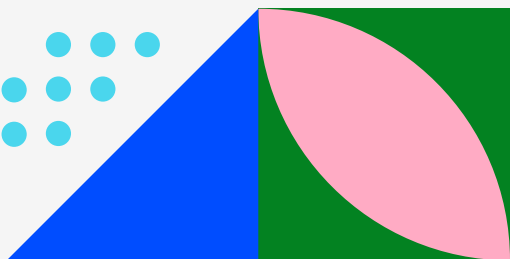
**&**

**90%**

**LGBTQ+**

**noticed brands celebrating Pride in previous years**

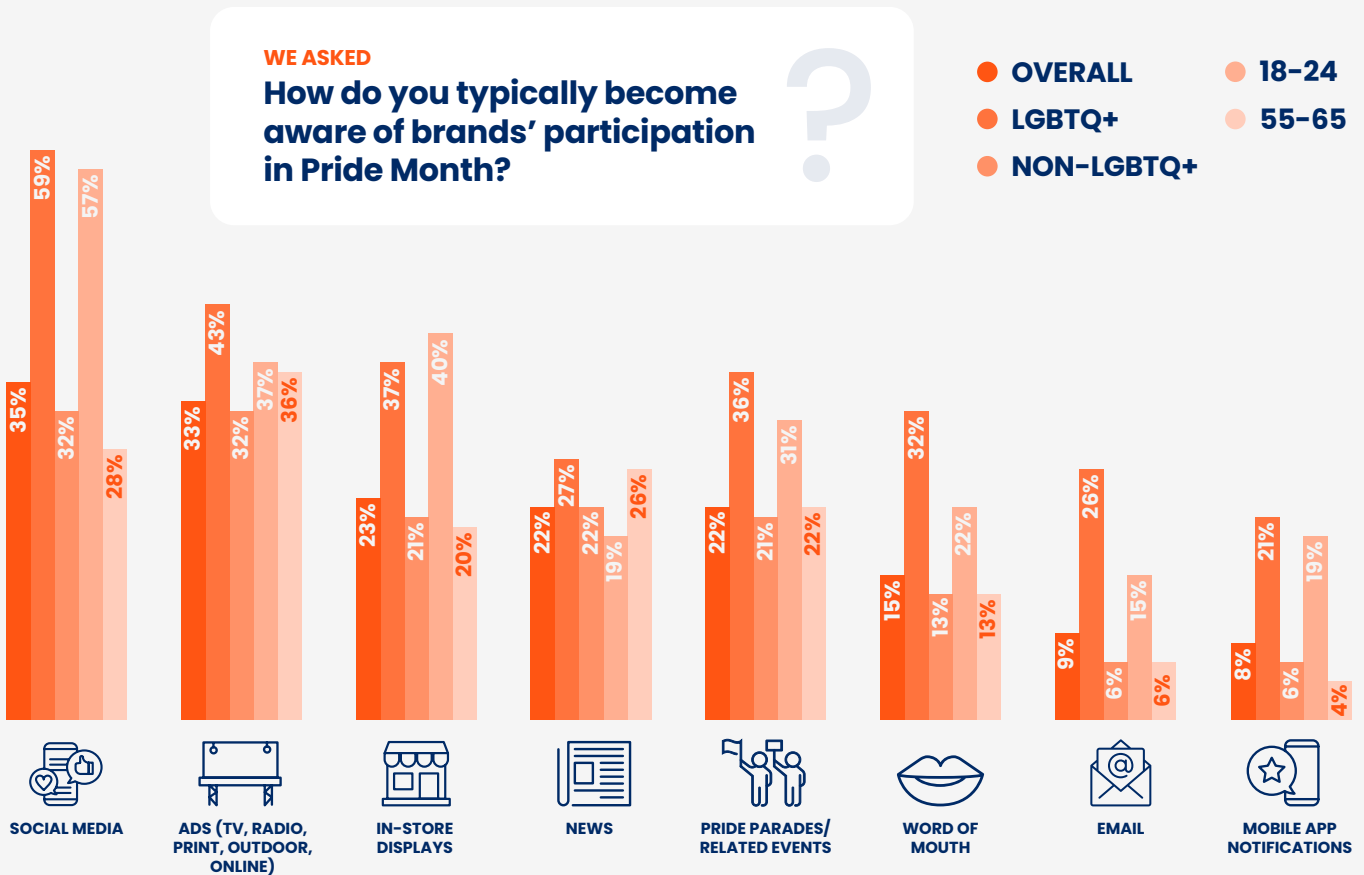
A majority of people said they were aware of Pride Month prior to taking the survey, and over a third said they were "very aware." Nearly two-thirds also said they have noticed brands celebrating Pride in previous years. These numbers rise dramatically among the LGBTQ+ audience, who are likely more attuned to LGBTQ+ content and more targeted in the digital landscape.



# Brand allyship goes beyond Pride parades

Previously brands showed LGBTQ+ support through rainbow-hued logos and Pride parades. People grew tired of rainbow washing and sought more tangible, impactful actions.

As brands face this increasing demand for more consistently inclusive content, they have turned to social media and advertising. Here consumers notice allyship most. Older people are more likely to notice Pride support in the news. Younger and LGBTQ+ people notice it in social media and in-store displays, taking note of efforts that go one step further than a statement.



## THE TAKEAWAY

Pride Month cannot be ignored. Nearly all LGBTQ+ consumers notice when brands showcase allyship, and a good portion of the general population does too. LGBTQ+ and younger consumers also notice content across multiple touchpoints. Marketers can't address a specific audience in one place and expect that others won't see it. Standing behind cohesive, integrated messaging goes a long way.

**START TODAY:** Create decisive statements of Pride crafted to strategic audiences, reflective of the value and policies of your brand.

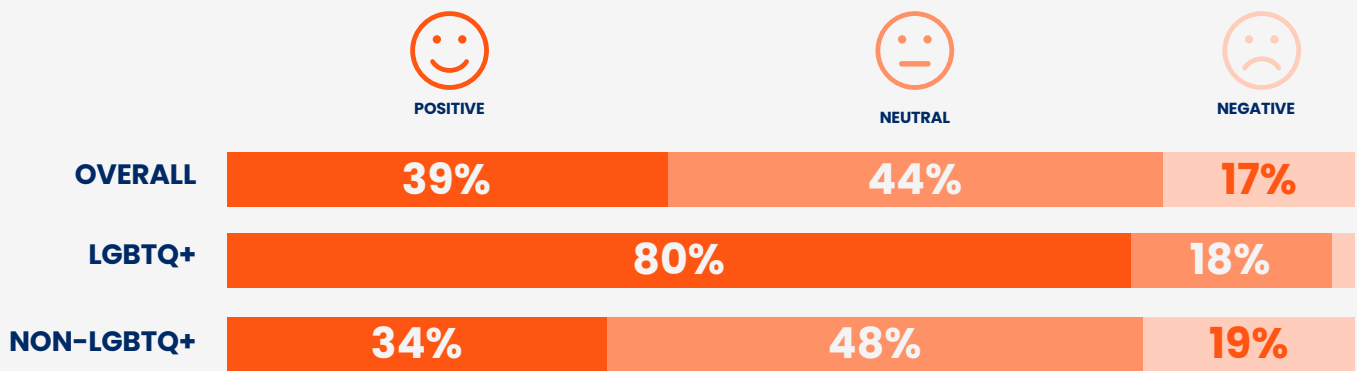
# Brand allyship done right sees full-funnel benefits

Marketers have long discussed that addressing the LGBTQ+ audience with relevant and authentic messaging is imperative for brand growth. Here, we look at the role Pride participation plays in brand perceptions and purchase behaviors.

**WE ASKED**  
**If a brand celebrates Pride Month, how does that impact your perception of it?**



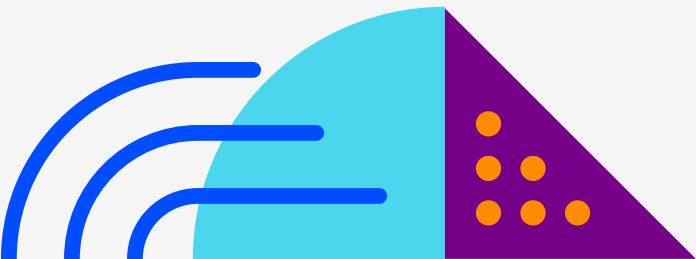
*\*Numbers under 2% are not represented in the chart*



The greatest segment of consumers said Pride participation does not impact brand perceptions. Among those that said it does, people were far more likely to say that it moved the needle positively than negatively (+22 points).

There’s a chasm between LGBTQ+ consumers and the general population. Eighty percent said they think more positively of brands who participate in Pride month; nearly half (46%) said “very positively.” One-fifth remain neutral, perhaps because they know that Pride participation doesn’t necessarily translate to authentic allyship.

**39%**  
**GEN POP**  
**&**  
**80%**  
**LGBTQ+**  
**Favor brands who celebrate Pride**



The brand-building opportunity during Pride is clear, for many organizations, the benefits can happen further down the funnel. The pressure is only rising. The Wall Street Journal [reported](#) that a growing number of conservative activist groups are instilling fear in shareholders about the profitability risks of LGBTQ+ marketing. But our data suggests that there can actually be more to gain.

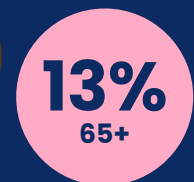
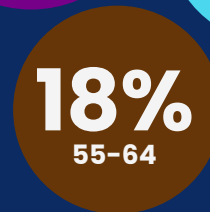
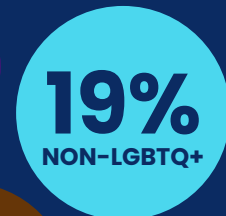
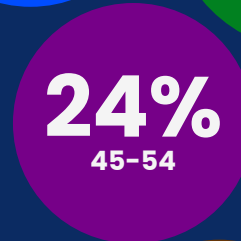
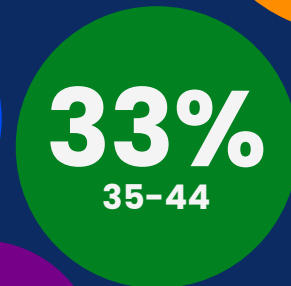
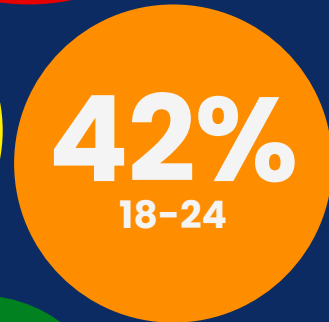
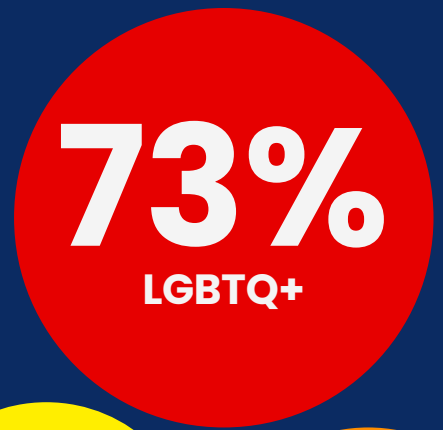
**WE ASKED**

**Have you ever intentionally purchased a product that is marked with a Pride celebratory message because of that message?**



While only a quarter of people overall said they have purchased a Pride product, the number is much higher among influential younger and LGBTQ+ consumers, at +16 points and +47 points respectively. We've found in previous reports that these cohorts tend to align their purchase decisions, with their values.

The meteoric rise among LGBTQ+ consumers suggests that they are more intentional about their purchase decisions. The willingness to buy from Pride allies is a huge opportunity for brands to reach this mass market and capture the spending power of this mass market.



**THE TAKEAWAY**

Media headlines will discuss the negative impact of consumer boycotts on the bottom line, but often omit that backtracking support can be just as damaging. There are far more people who look favorably on brands that do celebrate Pride month than those who do not, particularly among influential younger and LGBTQ+ audiences. The ROI is twofold: long-term business and community benefit.

**START TODAY:** Examine your audience and create a strategy that considers the realities of a growing LGBTQ+ community and potential backlash.



# Pride beyond June

Pride Month is just 30 days, but true allyship extends beyond that. Half of consumers said it is important to show support for the LGBTQ+ community all year long, not just in June, and less than a quarter said it was not important at all. Brands that break down the June echo chambers and approach LGBTQ+ communities through substantial, non-performative gestures all year long will win.

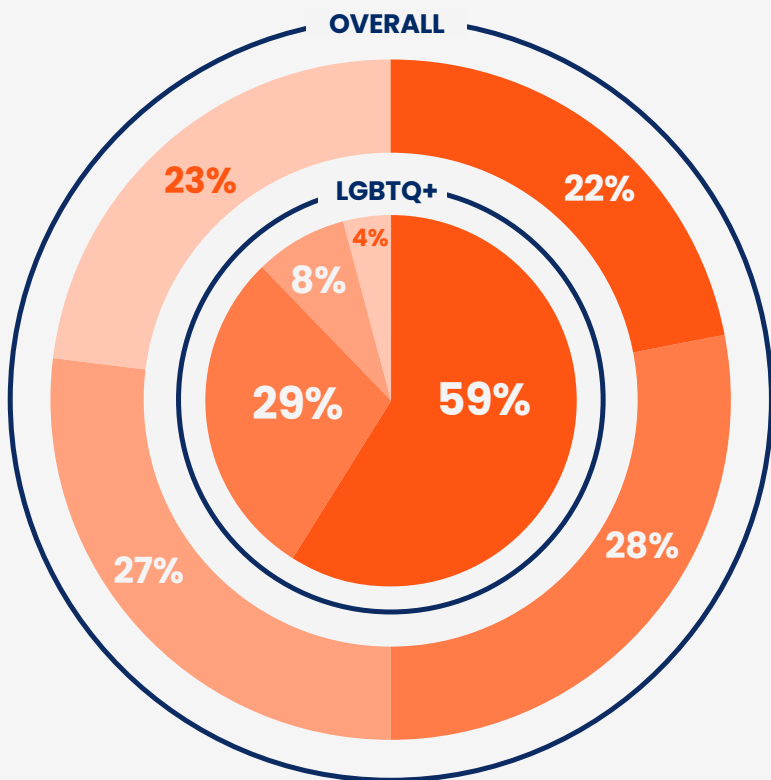
Only 22% of consumers said that they don't believe a brand celebrating Pride Month supports the LGBTQ+ community in other ways. People expect marketers to communicate allyship in ways outside of the usual cycle of content we see in June.

## WE ASKED

**How important is it for marketers to show support for the LGBTQ+ community all year long?**



- VERY IMPORTANT
- IMPORTANT
- NEUTRAL
- NOT IMPORTANT



**50%**

**GEN POP**

**&**

**88%**

**LGBTQ+**

say it's important to support the LGBTQ+ community year-round

# Pride beyond June (continued)

To better understand how brands can best support the LGBTQ+ community according to consumers, we asked people to select what is most important to them.

Workplace policies, representation and event participation outside of Pride, and community support in owned social media content topped the list... though products, donations and Pride participation are not far behind. Lowest on the list are celebrity and influencer partnerships with LGBTQ+ voices in content across channels.

## WE ASKED

Which actions by brands/companies do you believe are most important in supporting the LGBTQ+ community?



People see all of their interactions with a brand as one bigger experience. Products, political affiliations, and workplace policies all factor into their understanding of a company’s values and, in turn, influence perceptions. Brand integrity is rooted in every action an organization takes touching the LGBTQ+ community... and all of its customers.

**START TODAY:** Audit your brand’s representation – across every channel – through the eyes of consumers who don’t separate your corporate policies from your brand communications, and edit accordingly.



We look forward to the DISQO and Do the WeRQ LGBTQ+ Advertising and Brand Experience insights every year to be able to share direction with our agencies and their teams who work on campaigns and interact with clients on a daily basis. The insights reinforce once again that Pride can’t just be demonstrated in June and that companies need to be recognizing and promoting the LGBTQ+ community year-round. How companies go to market and communicate with customers and employees on an ongoing basis shows their commitment to diversity and equity in a consistent and authentic way.

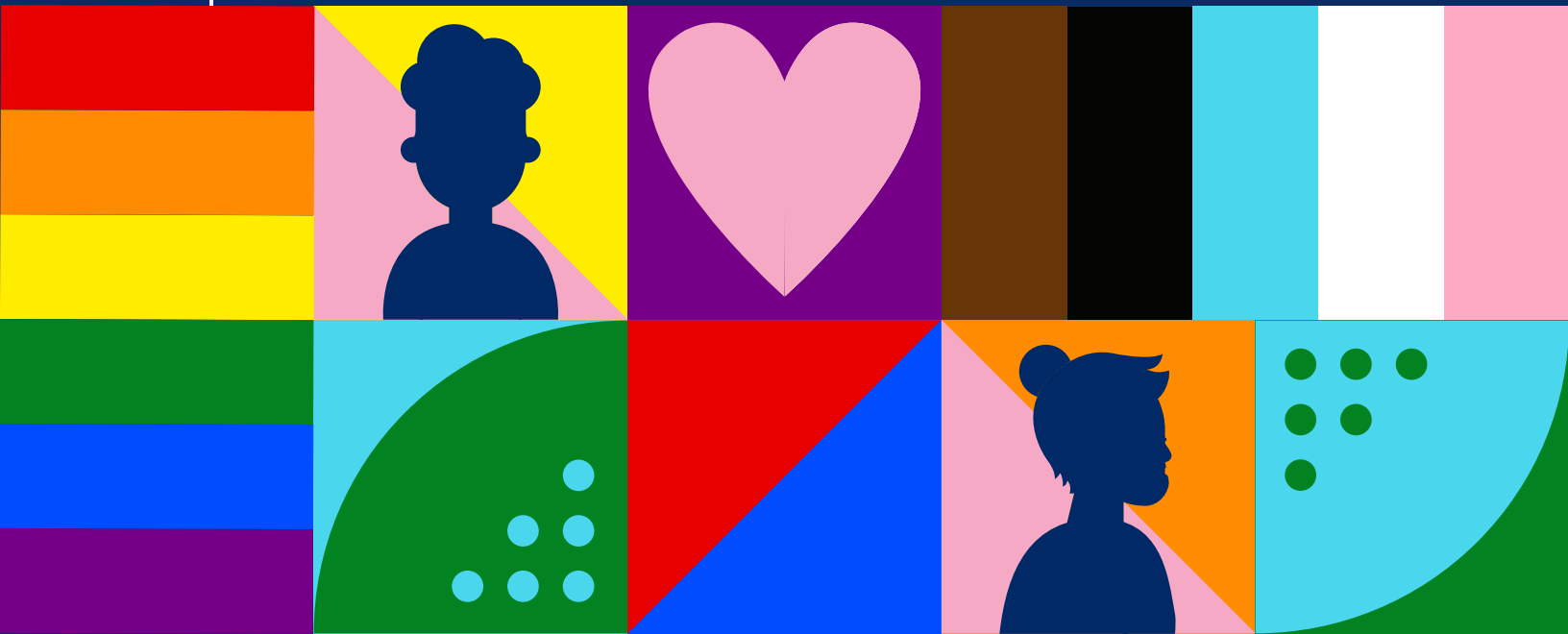


**DAVID AZULAY AND DEVIN O’LOUGHLIN**

*Global Co-Chairs, Omnicom OPEN Pride (LGBTQ+ ERG)*



**Omnicom**



# Gauging the impact of brand missteps

It was hard to miss the media headlines and social media chatter about brands' missteps during Pride last year. It's even harder to imagine that these very public conversations didn't have an impact on consumer perceptions of brand behaviors and influence this year as it relates to LGBTQ+ support. To understand exactly how they have shifted, we examined data points from our 2024 survey against identical questions asked last year.

## Brand influence in the wake of controversy

Last year did unequivocally sway consumer opinions about brands' influence over LGBTQ+ rights in the US. In comparing responses between May 2023 and 2024, we see a tremendous decrease in those who said they are "unsure" about brand influence, suggesting that more people have an opinion (one way or another) about the role brands play in social justice.

LGBTQ+ consumers are far more likely than the general population to have been swayed. They are split evenly between an increase in "a lot" of influence and "some" influence. They have felt firsthand how a brand's allyship and/or backtracking can shape conversations in business and society. The general population increased perceptions of "some" influence and decreased perceptions of "a lot" of influence.

Overall, there is a higher bar for brands to live up to their perceived influence on LGBTQ+ rights in the US across the board, particularly among LGBTQ+ audiences.

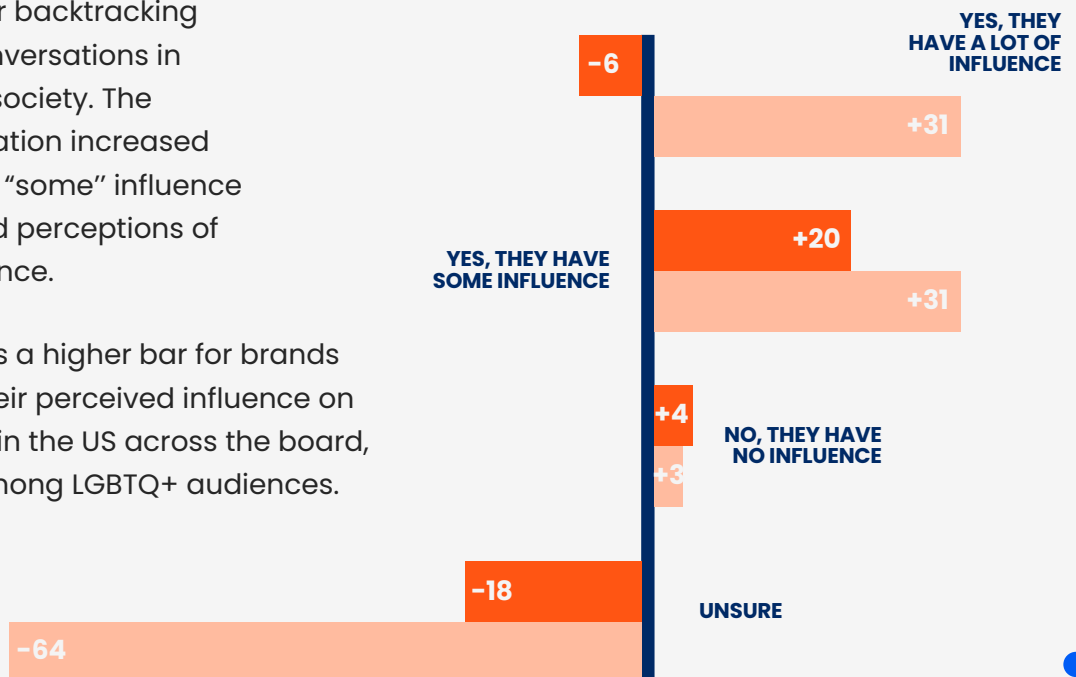
### WE ASKED

**Do you believe brands have an influence on how society perceives LGBTQ+ individuals in the US?**



### YoY Change: 2024 vs. 2023

● OVERALL ● LGBTQ+



# Pride is mainstream, but is LGBTQ+ representation?

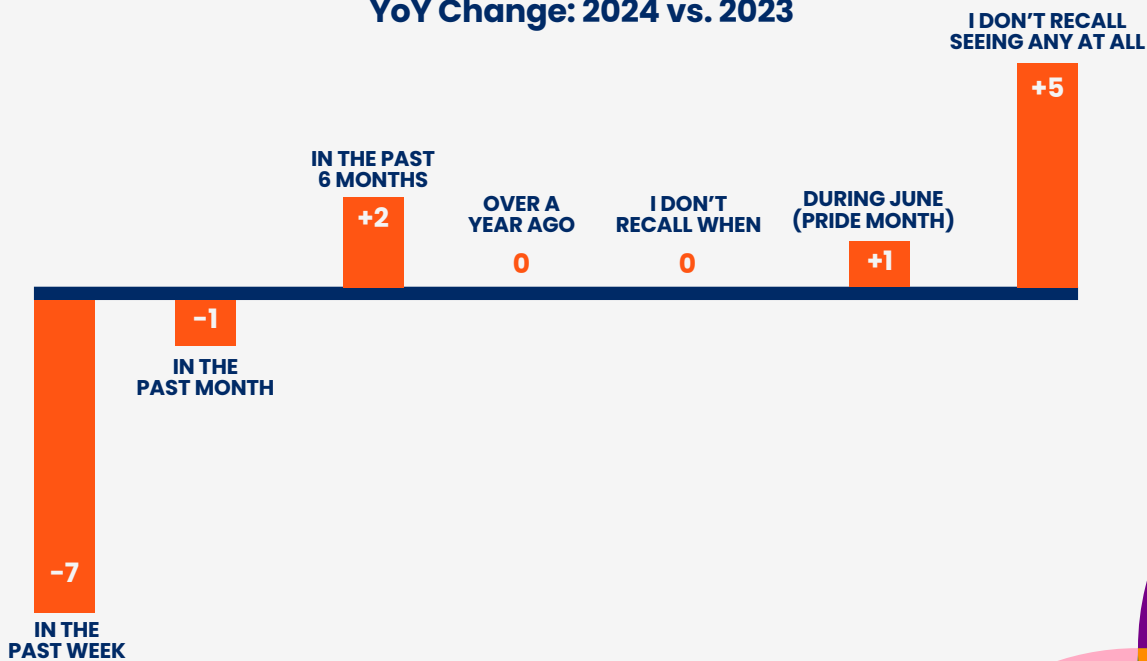
We also looked at recall of LGBTQ+ representation in advertising overall, compared to last year. These differences are relatively muted. This suggests that last year's events haven't necessarily had a huge impact on the volume of published LGBTQ+ content leading up to Pride.

## WE ASKED

When did you last see/hear LGBTQ+ representation in ads on TV, online, outdoors, at events, or on the radio?



## YoY Change: 2024 vs. 2023



# Continued...

We also looked at shifts in where consumers have noticed LGBTQ+ content. Everyone said they saw less LGBTQ+ content specifically geared toward those audiences. Both the general population and non-LGBTQ+ consumers saw an increase in mainstream representation content, while LGBTQ+ consumers reported an increase in both regular and LGBTQ+ programming. This is encouraging, given that LGBTQ+ consumers are often treated as a niche, even though they are a mass market. However, there is still plenty of room for growth.

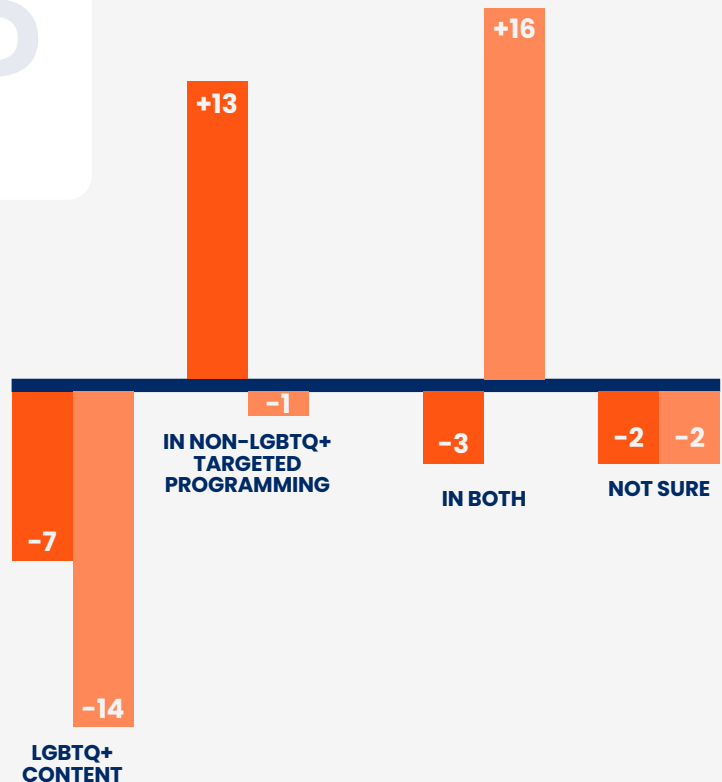
**WE ASKED**

**If you recall seeing ads with or about LGBTQ+ people within media content, what kind of content was it?**



- OVERALL
- LGBTQ+

## YoY Change: 2024 vs. 2023



## THE TAKEAWAY

In a year where organizations may be reticent to express LGBTQ+ support publicly, brands can have an outsized impact. Consumer expectations may be more tempered as a result of last year's events, but they don't care any less. They will be watching marketers closely to gauge how they advance societal conversations.

**START TODAY:** Accept the realities of modern marketing and society, and create contingency plans for backlash – knowing that consumers will act and spend in support of brands that truly commit to weather the storm.

# The people who drive markets should inspire strategic commitment to LGBTQ+ communities



**GRAHAM NOLAN**  
*Co-Chair, Storytelling & Partnerships*  
**DO THE WERQ**



**KATE WOLFF**  
*Co-Chair, Programming & Operations*  
**DO THE WERQ**

Do the WeRQ has been clear on our perspective that the enemy of progress – in terms of LGBTQ+ representation in marketing and advertising – is not hatred from people who oppose our existence, so much as it is the uncertainty and hesitance on the part of allies wary of backlash. Highly publicized marketer missteps in 2023 ushered in an eerily silent 2024, where no marketer wants to be the next to mess up. This is glaring in a divisive election year.

When asked “If a brand celebrates Pride Month, how does that impact your perception of it?” the 34% of non-LGBTQ+ people who feel positive outnumber the 19% who feel negative. The disparity becomes more pronounced when you account for LGBTQ+ people – who comprise [7.6% of the general population](#), and potentially [30% of Gen Z adults](#).

Countless other studies indicate why marketers must push forward with strategic, meaningful support for our community. But while consumer expectations of corporate commitment may be more tempered as a result of last year’s events, most people don’t care any less about the need for progress. In fact, the numbers point very solidly toward majorities who favor societal inclusion of LGBTQ+ people across all facets of society – business included.

Smart marketers will focus on the future to decide their true audience. Making business decisions that exclude potentially 3/10 of your audience in response to a loud, shrinking demo is a missed opportunity that might make you adjust your approach pretty quickly.

If it doesn’t, look to the people who fight for their rights – in the face of the same opposition, with far fewer resources – for inspiration on how you commit to your purpose. Let courage come from the growing demo that generates connective culture.



# Executive summary + strategic recommendations

Understanding how to support the LGBTQ+ community with integrity and impact can be tricky for brands. Our 2024 report dives into the consumer attitudes that are driving today's societal changes. While we provide these important takeaways, it is up to marketers to know what will – and won't – move the needle with their customers.

## **CREATE DECISIVE PRIDE STATEMENTS**

crafted to strategic audiences that reflect your brand values and policies

Inclusive workplace policies is the #1 action brands can take to show support

## **EXAMINE YOUR AUDIENCE AND CREATE A STRATEGY**

that considers the realities of a growing LGBTQ+ community and potential backlash

People notice Pride participation most in social media (35%) and ads (33%)

## **AUDIT YOUR BRAND'S REPRESENTATION**

across every channel through the eyes of consumers who don't separate corporate policies from brand communications

50% say it's important to support the LGBTQ+ community outside of June

## **CREATE CONTINGENCY PLANS FOR BACKLASH,**

knowing that consumers act and spend in support of brands that truly commit to weather the storm

80% of LGBTQ+ consumers favor brands that celebrate Pride



# Advertising Measurement

WITH  DISQO

## Brand Lift & Outcomes Lift

DISQO provides holistic ad measurement with a single-source, identity-based methodology. Our Brand Lift product enables cross-platform measurement of attitudinal lift on KPIs like awareness, consideration, and favorability. Our Outcomes Lift product uniquely adds measurement of post-ad exposure digital behaviors like search, site visits, and e-commerce activities. Combined, these products give a complete picture of full-funnel advertising effectiveness.



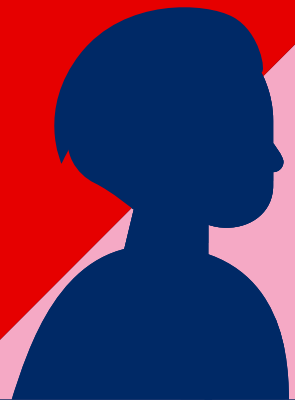
### BRANDS & AGENCIES

At a time when media spend is under scrutiny, DISQO reveals exactly how advertising drives tangible business outcomes and, importantly, which channels are moving the needle most. This allows you to prove the effectiveness of investments and make valuable ROI optimizations.



### MEDIA PLATFORMS

Media platforms today need to prove how their content delivers against campaign goals. DISQO offers measurement of consumer actions post-ad exposure once the consumer leaves your domain. This enables powerful conclusions about performance and enables you to get proper attribution for the efficacy of your media and ad formats.





2024 REPORT

# Measure your purpose-led campaigns with DISQO

## DISQO

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