



REPORT

2025 LGBTQ+ Advertising

Marketing in the
quiet age of DEI



The Great DEI Divide

Why some brands are retreating on LGBTQ+ inclusion and others are doubling down

Pride celebrations across the US in 2025 faced unprecedented challenges, with major corporations withdrawing support amid political pressures and obscured public sentiment. These pullbacks are just one example of a larger trend of brands dismantling Diversity, Equity, and Inclusion (DEI) efforts, leaving many to ask, “What will this cost—or save—my brand in the long run?”

For some, DEI has become a contentious lightning rod, but for others, it has become a valuable differentiator. From Apple to Patagonia, some companies are reasserting their values and seeing gains in loyalty, talent, and resilience. Meanwhile, others opting for silence or regression see brand, trust, and profits erode.

To succeed in today’s complicated environment, you must understand the full DEI picture for your brand, from public perception to inclusive advertising to the long-term impacts of rollbacks. Only then can you implement a DEI playbook that protects your brand and keeps your customers coming back for more. The big picture of DEI painted in this report illustrates how brands can commit to LGBTQ+ communities and their supporters.



Methodology

DISQO surveyed 1,955 US adults (18+) from our identity-based audience April 15–19, 2025. The sample was balanced on age, sex, and income, then weighted to reflect the U.S. population.

DISQO’s ad effectiveness measurement platform enables deep consumer understanding and measurement of attitudes and behaviors. This study focused on consumer perceptions of LGBTQ+ representation and DEI in advertising, with attention to differences across demographic groups, media habits, trust dynamics, and purchase behaviors. The report’s structure and focus directly reflect Do the WeRQ’s mission: to elevate LGBTQ+ creativity, representation, and share-of-voice in advertising and marketing.

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Courage and consequence: DEI and LGBTQ+ advertising inclusion

DEI—a longstanding, harmless way to represent organizational frameworks aiming for inclusion—is now this year’s most controversial initialism. It captivated the news cycle as it became the target of constant, coordinated attacks from the current administration. The characterizations of DEI became so extreme, that it was clear there was a pervasive misunderstanding of it. As it continually gains notoriety, we asked ourselves: do people know what DEI stands for? And what could its changing impact mean for LGBTQ+ inclusion in business and culture?

Our first hypothesis in this study proved devastatingly accurate. DEI remains widely misunderstood. With only 46% of consumers able to correctly define the acronym and 28% unable to identify any component terms, we’ve confirmed that brands are operating in a knowledge vacuum. When consumers don’t understand what DEI encompasses, they can’t recognize its value, leaving vital programs vulnerable to mischaracterization and political weaponization.

Our second hypothesis, that consumers want the substance of diversity without the buzzwords, also rang true. The data reveals a striking paradox: while LGBTQ+ visibility in advertising dropped 15 percentage points since 2023, 68% of consumers still want the same or more representation. Demand exists; it’s the courage to meet it that’s wavering. Brands are retreating from language while consumers are asking for action.

Most tellingly, our third hypothesis about the cost of corporate rollbacks was validated in stark financial terms. The research exposes reactive rollbacks as a catastrophic miscalculation: 41% of consumers lose trust when brands retreat from DEI commitments, while 39% have already changed their purchasing behavior in response to such pullbacks. The math is unforgiving. Companies are sacrificing long-term brand equity to appease a vocal minority.

What surprised us most: the trust gap across generations. LGBTQ+ consumers are 38% more likely than the general population to say DEI rollbacks reduce their trust in a brand—with Gen Z showing similar sensitivity. These aren’t just moral disappointments, they’re market signals from audiences with significant spending power and cultural influence.

The brands that will thrive in this environment aren’t those that shout the loudest about their values, but those that prove them through sustained action, especially when the spotlight dims.

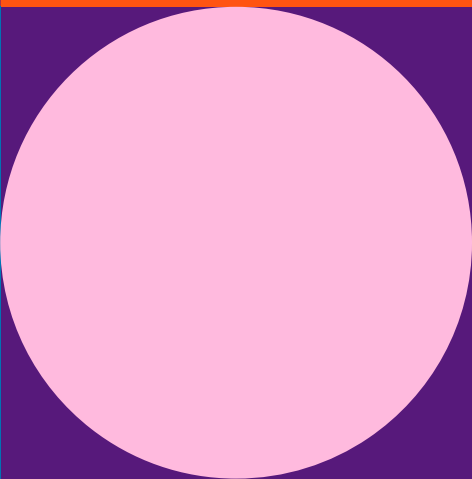
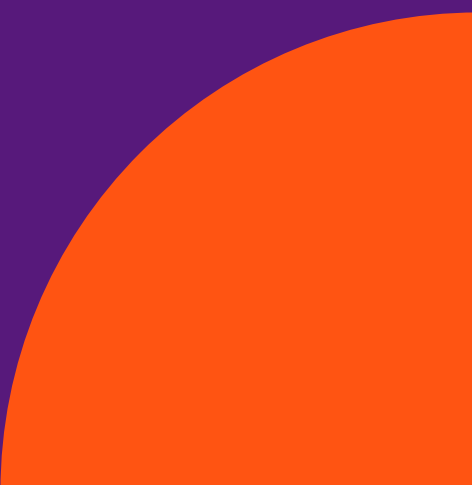
As this research demonstrates, consumers are watching, measuring, and responding with their wallets.



Kaitlyn Barclay

Data Director

DO THE WERQ



Creative integrity and representation begins with us

Creative work is inherently leadership. From the moment an idea is sketched on a whiteboard to how the story is told to how it lives in-market, creatives are deciding how people are seen, heard, and included...or not. That responsibility is particularly clear in this year's report with Do the WeRQ. It reminds us that LGBTQ+ representation isn't a trend: it's a trust signal with impact. Consumers across demographics—including non-LGBTQ+ folks—are asking brands to show up for the community with consistency, integrity, and care. Not just in June, but all year and in all spaces.

As creatives, creators, and storytellers, that call-to-action starts with us. It's ingrained in who we hire, how we collaborate, where we place our media, and how deeply we are willing to question if our ideas reflect our lived experience beyond stereotype.

Our community doesn't need grand gestures. We need sustained brand integrity in creative and messaging. The stories we shape don't just reflect culture, they explain and represent it to the world.

Along with the C-suite and other brand executives, we, too, have the power to build the future of inclusive advertising. So, let's do it well with pride, prowess, and perseverance.



Megan Pugh

Creative Director & ERG Leader



The state of DEI

Despite years of advancement in DEI efforts, many companies are facing a new, complicated environment in 2025, leading to this being the year of strategy shifts for many. To firmly set the stage for LGBTQ+ advertising today, exploring public understanding and confidence around DEI is necessary.

Misunderstandings, skepticism about intent, and shifting political dynamics have created new challenges for brands aiming to lead purposefully. Yet, the data is clear: when done right, DEI efforts drive brand trust, relevance, and even reputation scores. To succeed, companies must simplify their message, demonstrate consistency between values and actions, and reach people on trusted platforms.

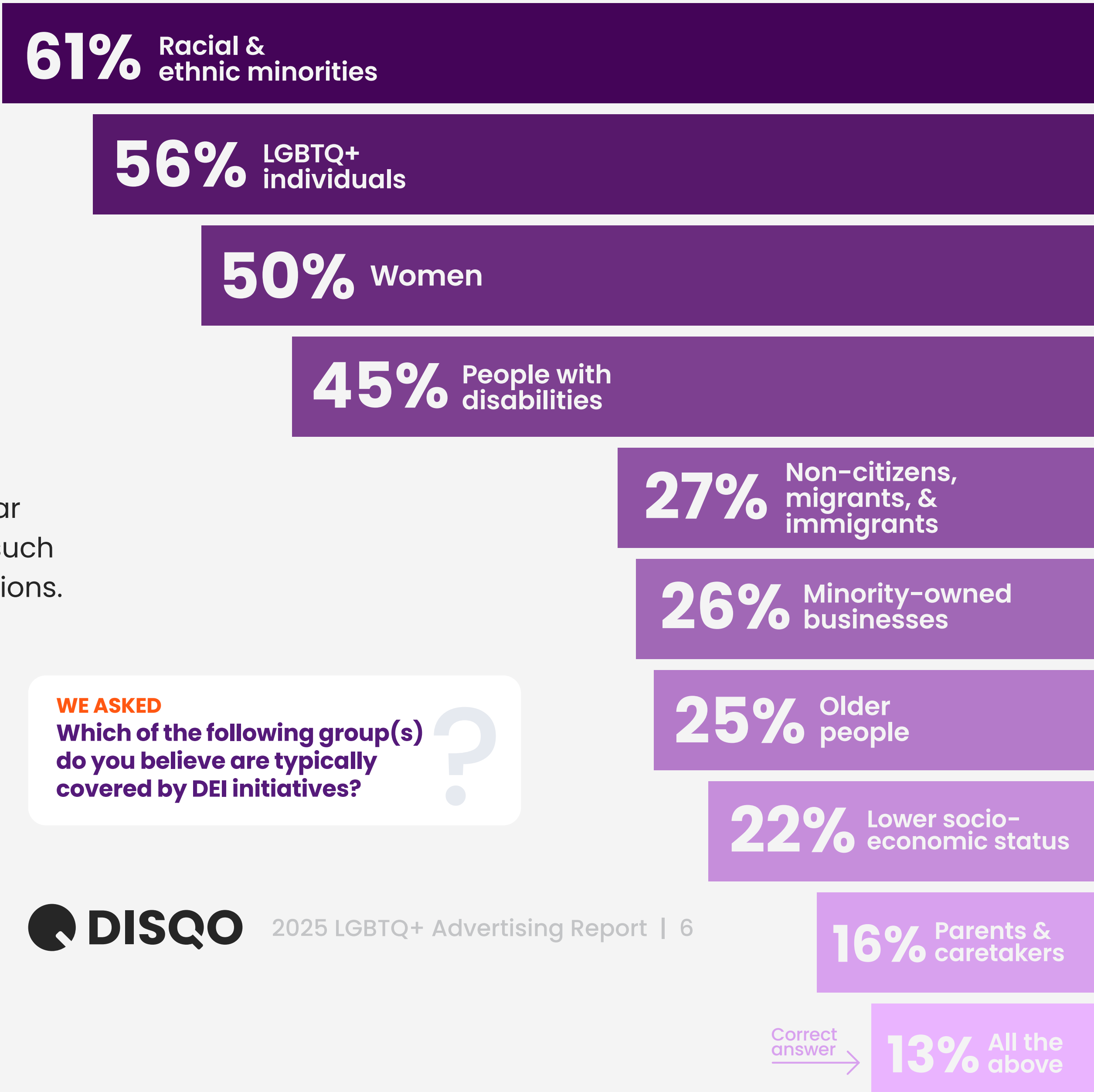
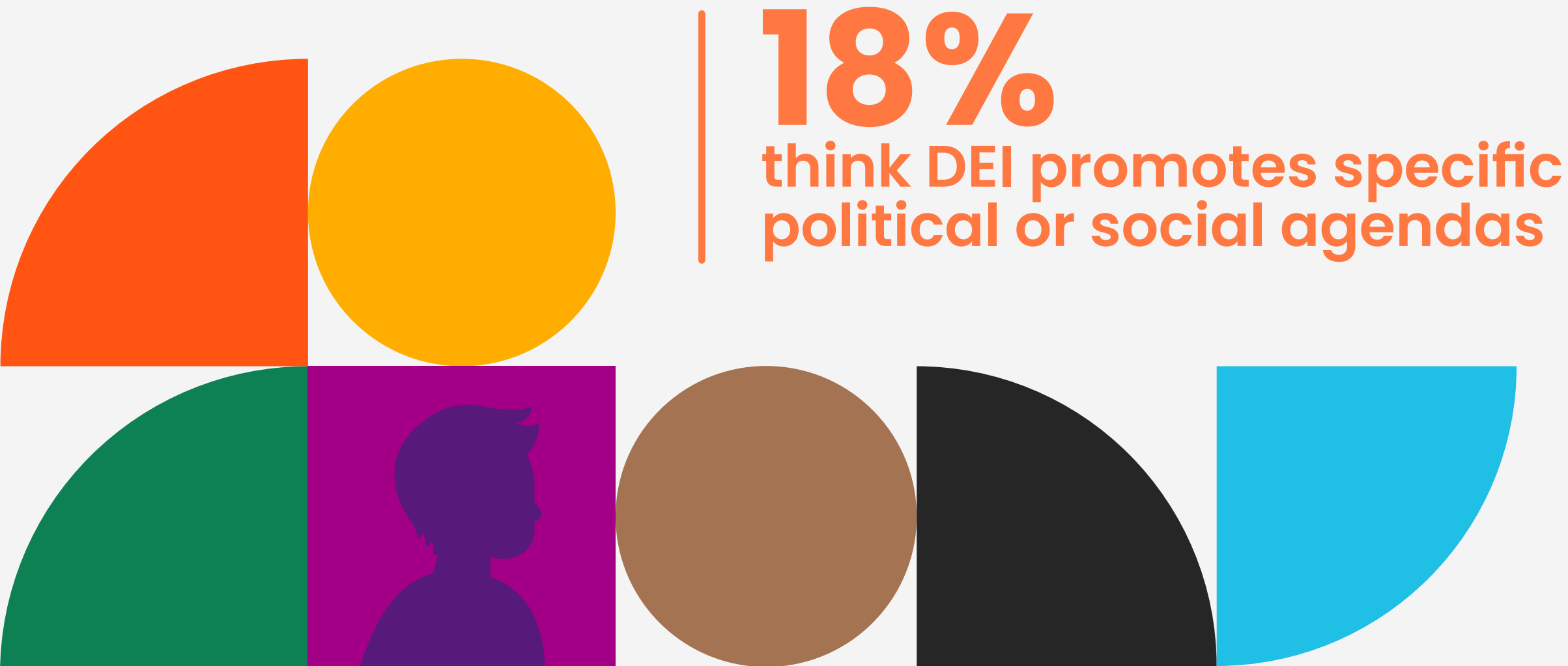
ONLY
46%
correctly
identify
“DEI” terms



THE STATE OF DEI

DEI is widely misunderstood

Only 46% of people can correctly define the DEI acronym, and 28% couldn't identify any of the terms. This confusion leaves DEI programs vulnerable to mischaracterization. While most agree that DEI exists to ensure fair hiring practices and inclusive workplace environments, nearly one-fifth feel that DEI exists to establish quotas or promote political or social agendas. Many people also tend to have a limited view of who is helped by DEI initiatives, with racial and ethnic minorities, women, and LGBTQ+ being the most popular selections. The reality is that many DEI initiatives support other groups, such as older adults and parents, across all ethnicities, genders, and orientations.



The activism paradox

While headlines spotlight brands pulling back from social issues, consumers aren't on the same page. In fact, their support for brand activism is holding steady—and even growing. In 2025, 35% of people said brands should speak up externally and internally, with another 10% supporting internal-only involvement, and 17% supporting it if it's relevant to their brand. That's a rise from 33% last year, even though the prior survey didn't differentiate between internal and external action. Meanwhile, opposition remains flat at 28%. The message is clear: consumers still expect brands to lead with purpose.

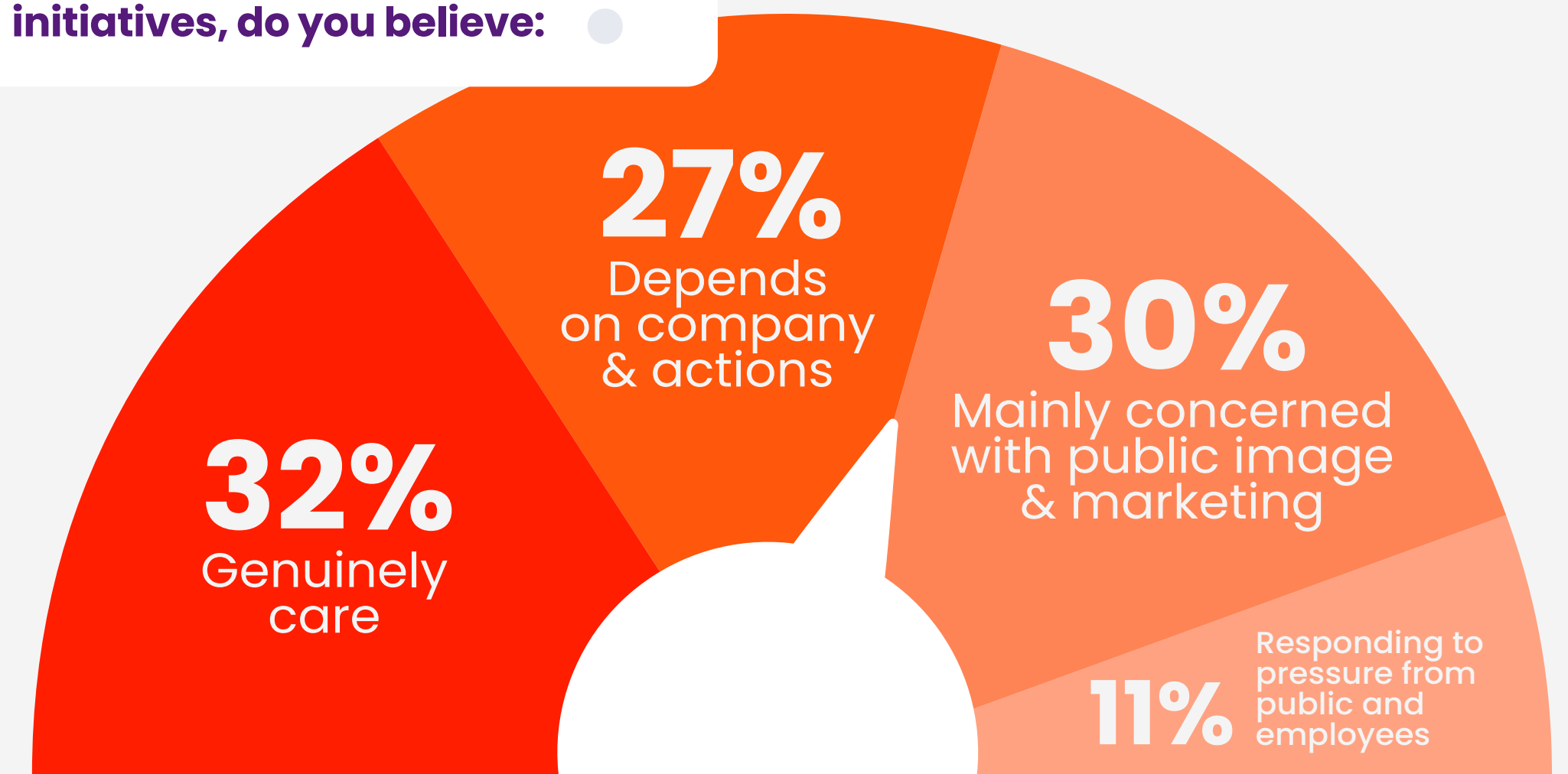
62%
support
brands
speaking up

Talk is not enough

Consumers expect brand involvement in social issues, but translating that expectation into reputation isn't clear-cut. Nearly one-third see brands' DEI efforts as genuine and another 27% say it depends on the brand and its follow-through. Forty-one percent remain skeptical, viewing DEI efforts as performative PR or a response to pressure, demonstrating that brands that speak out must be ready to prove it and lead with integrity. Brands aren't criticized for getting involved—they're criticized for being inconsistent or superficial.

WE ASKED

When you see a company publicly supporting DEI initiatives, do you believe:



Where trust lives

Where people get their DEI information matters, and so does how much they trust it. Websites are the most common and most trusted source overall. But trust doesn't always track with usage. Social media, for example, shows the widest trust gap: 56% of Gen Z cite it as their top source for DEI content, yet only 36% say they trust it. This 20-point trust gap reveals more than just platform issues—it signals a shift toward peer-to-peer communication. In the absence of trusted institutional voices, Gen Z is defaulting to lived experience and community consensus. That creates a growing echo chamber of groupthink, making it harder for brands to re-enter the conversation with clarity and credibility.



	SOURCE	TRUST	GAP
Online	45%	42%	-3%
TV	42%	32%	-10%
Social media	40%	25%	-15%
Word of mouth	19%	24%	5%
Corporate messaging	15%	16%	1%
Radio or podcasts	13%	16%	3%
Influencers	10%	14%	4%
Print	10%	9%	-1%
Email	7%	6%	-1%
Other	5%	7%	2%

Takeaways

You don't have to shout your values, but you do need to prove them. Today's consumers and employees can smell inauthenticity. The brands that will thrive are the ones that blend principled resilience with smart positioning—knowing when to speak loudly, when to act quietly, and always why it matters.

C-Suite

Build reputation with clarity, not acronyms. Only 46% of consumers can define DEI—this is a powerful opportunity to educate. Skip the buzzwords. Use clear, values-driven language about fairness, policy, opportunity, and business value to help people understand the why and drive inclusive growth.

Values without action undermine trust. Three in ten consumers think DEI is performative. Credibility starts inside the business—establish your values, then back them with tangible commitments: invest money, dedicate time, and tie public promises to outcomes for both the business and the communities you serve.

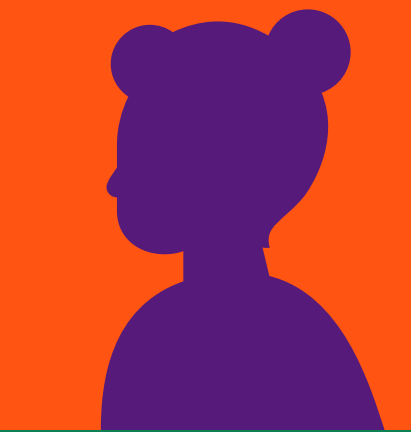
Transparency pays off. With websites being the most trusted DEI source, clear and accurate communication about progress is imperative. But don't stop at metrics—share where you are in the journey, what challenges you face, and how you plan to move forward. Vulnerability builds trust when it's honest, specific, and grounded in action.

Communications executives

Own the narrative or risk losing it. DEI is widely misunderstood. Go narrow and support initiatives and direct communities. Talk about the work you're doing and its universal benefits.

Consistency builds credibility. Thirty percent of consumers are already skeptical about DEI motives. Back every claim with proof—measurable actions like financial investment, platforming underrepresented voices, and transparent reporting—not just intentions.

Strengthen the channels consumers trust. Centralize your DEI information into a hub with SEO and SEM built in so the people looking for your story get the entire picture.



Marketing executives

Turn social into a trust channel. Gen Z and LGBTQ+ audiences use social media for DEI content, but don't fully trust it. Brands can close the gap with credible creators, consistent updates, and data-backed messaging.

Start with what people understand. Nearly one-third of consumers don't know what DEI means. Lead with language grounded in fairness, policy, belonging, growth, and opportunity.

Integrity must resonate. Only showing up for communities during heritage months is not enough. Brands that prioritize long-term commitments over campaigns—and take recurring action to advance representation and inclusion—build trust across consumer audiences.

Media planners

Match channels to generational trust. Boomers trust TV, Gen Z trusts social media, and websites span all generations. Tailor your mix to meet each audience where they trust.

Plan with perception in mind. Your media placements reflect your values. Choose media channels that already share DEI-relevant content so you can connect with discerning audiences where they place their trust.

Make inclusion an always-on effort. Don't relegate DEI efforts to a single month. Normalize inclusive messaging and media planning year-round to avoid skepticism and build real credibility.



LGBTQ+ inclusion: A litmus test for DEI integrity

Now that we've explored how consumers perceive DEI broadly, it's clear that LGBTQ+ inclusion is where those expectations are most concentrated and tested. This community is highly attentive to consistency between values and action. As brands navigate obscured public sentiment and increased political pressure, the risk isn't just saying the wrong thing; it's saying nothing. In 2025, how you show up for LGBTQ+ people is a measure of your values, your audience understanding, and your long-term brand equity. What happens next isn't just about Pride, it's about proving that inclusion is a year-round commitment.

56% that brands influence
how society perceived
AGREED LGBTQ+ people

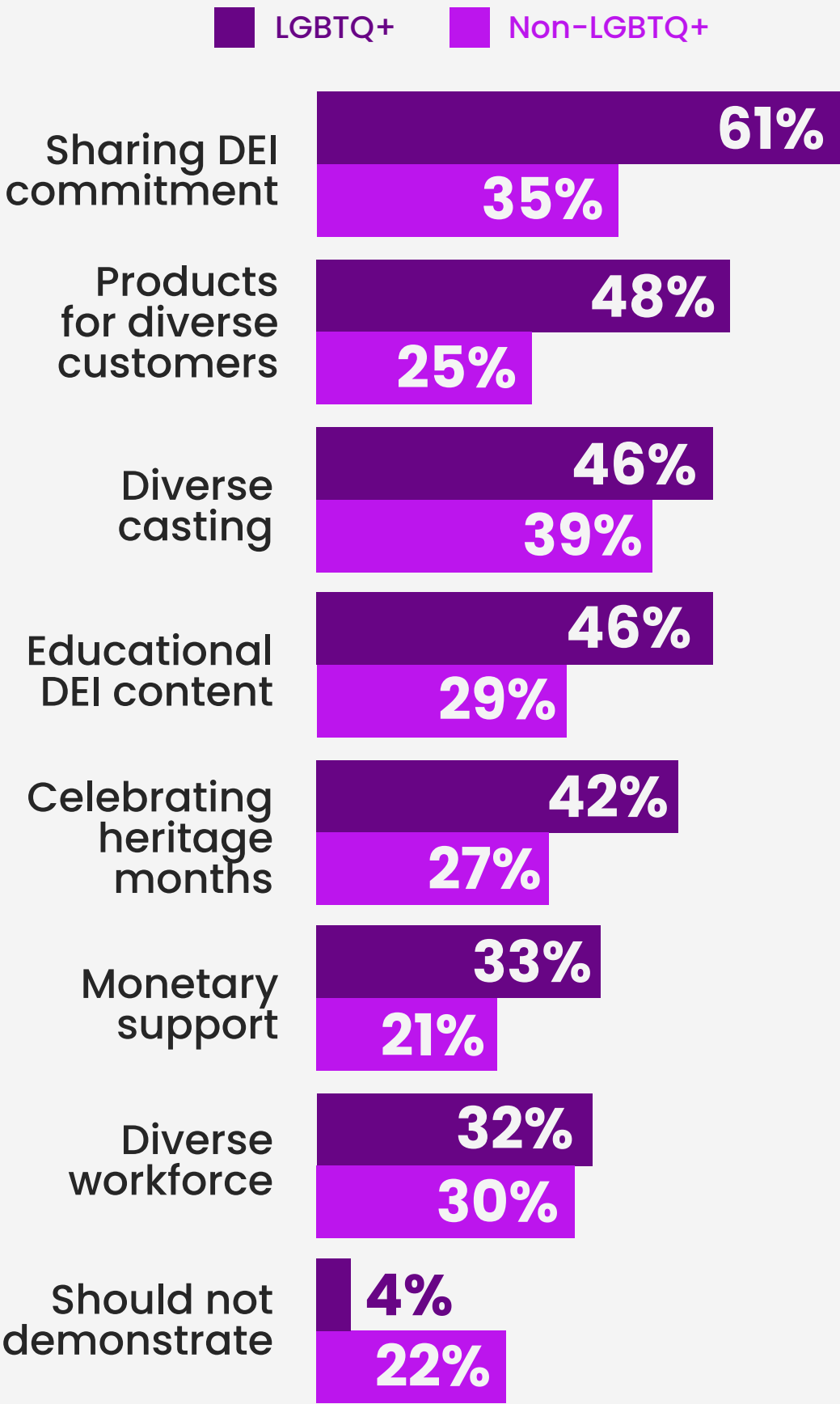
Representation is no longer enough

LGBTQ+ inclusion and integrity in advertising are no longer just a differentiator—they're table stakes. Forty percent of people say representation is a basic expectation. But LGBTQ+ audiences, which offer a global buying power of \$3.9 trillion annually, expect more. Sixty-one percent want brands to include their communities and actively affirm their DEI commitments visibly and vocally.

That expectation is layered. Nearly one-third of respondents want to see the same level of inclusion but with more diversity across race, gender identity, age, and ability. Consumers are looking beyond casting. Sixty percent of all respondents and 87% of LGBTQ+ people say brands should create ads with involvement from the people represented. That means hiring LGBTQ+ creators, strategists, and storytellers, not just featuring LGBTQ+ faces.

60% that diversity
behind the scenes
AGREED is important

WE ASKED
How do you expect
brands to demonstrate
inclusiveness?





LITMUS FOR DEI INTEGRITY

Visibility is dropping, but demand is growing

Despite growing expectations, LGBTQ+ visibility in advertising is falling. Since 2023, the number of people who recall seeing LGBTQ+ ads in the past six months has dropped by eight percentage points overall, and by seven points among LGBTQ+ people themselves.

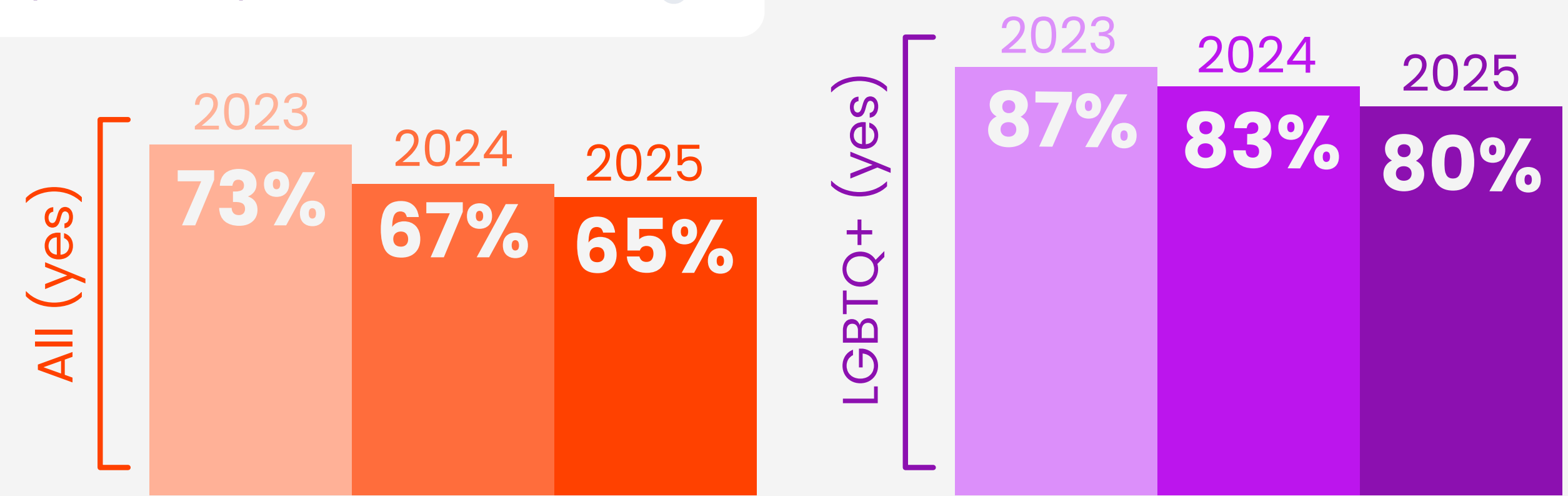
Yet, visibility still matters. Sixty-eight percent of people say they want the same or more LGBTQ+ representation in advertising.

Inclusion is not a passing trend, it’s a sustained consumer expectation.

This pullback moment offers a white space for leadership. Brands that consistently show up, especially outside of seasonal moments like Pride, can build stronger associations with values like acceptance, belonging, and innovation. Don’t isolate your inclusion. Normalize it.

68%
want the same or more LGBTQ+ representation in ads

WE ASKED
In the last 6 months have you seen or heard an ad featuring LGBTQ+ people on TV, online, outdoors, at an event, or on the radio?



Follow through with inclusion efforts

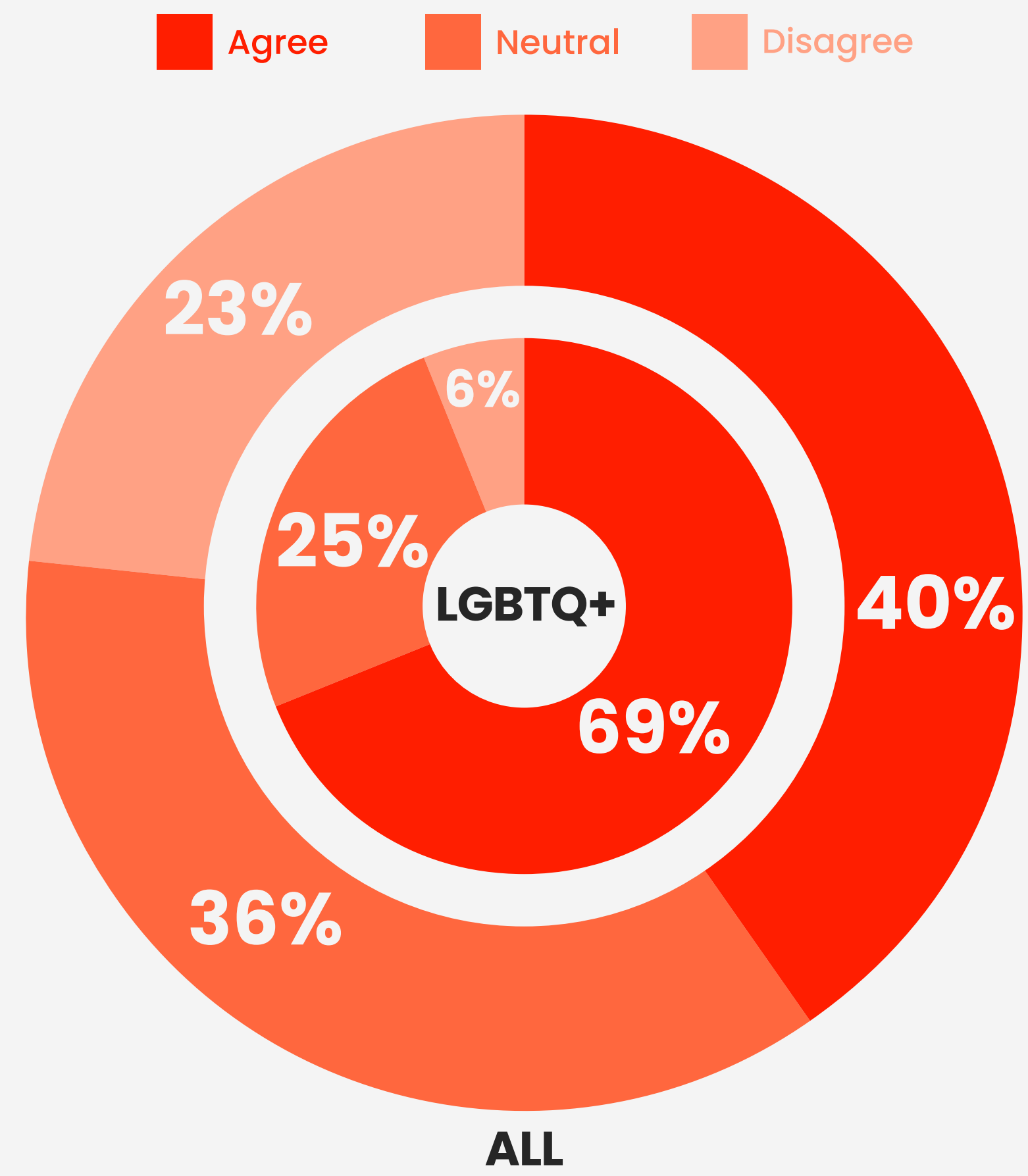
Forty-one percent of people say LGBTQ+ ads feel authentic. But 36.5% are neutral, and that neutrality is a warning sign, especially when LGBTQ+ people are more discerning about inclusion. Their neutrality is nearly 12 points lower, suggesting they hold brands to a higher bar.

Media strategy plays a significant role in consumers’ perceptions. They scrutinize who tells the story, where it runs, and whether it aligns with the brand’s actions. While TV remains the top recall channel overall, Gen Z and LGBTQ+ audiences are more likely to see LGBTQ+ ads on social media. They also expect more than visibility, with **46% of LGBTQ+ respondents wanting brands to provide educational content, not just inclusive casting.**

Effective inclusion requires precision. Meet people where they are, on the platforms they trust, with the tone they respect, and with creative that reflects their lived experience.

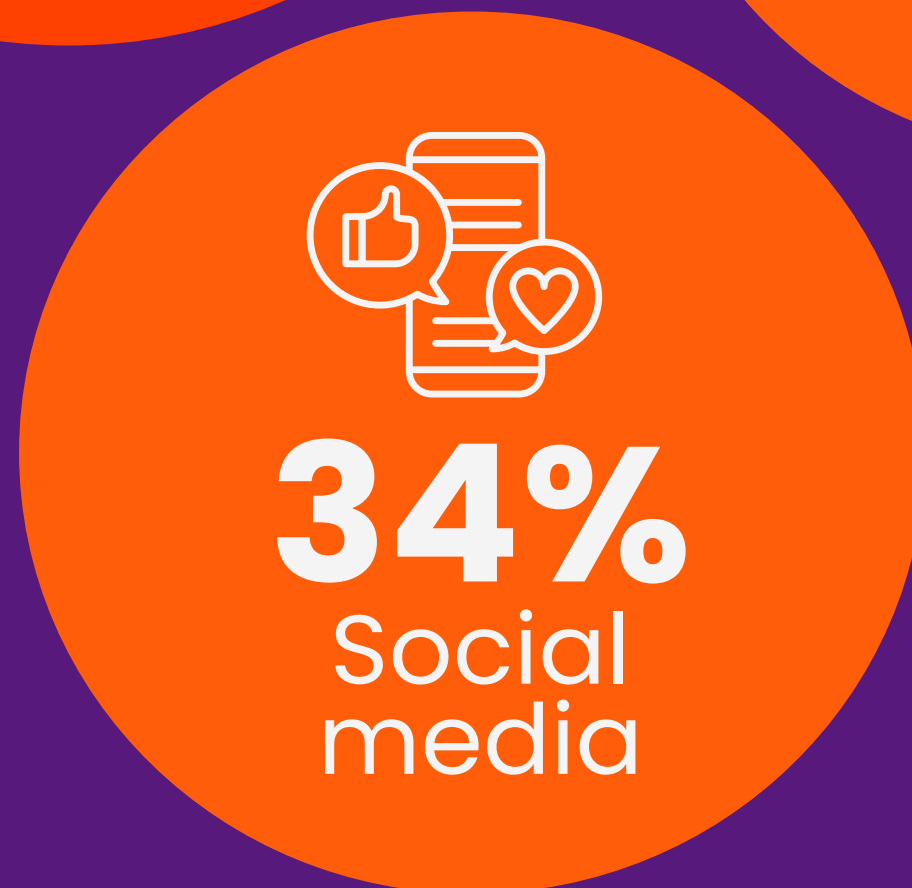
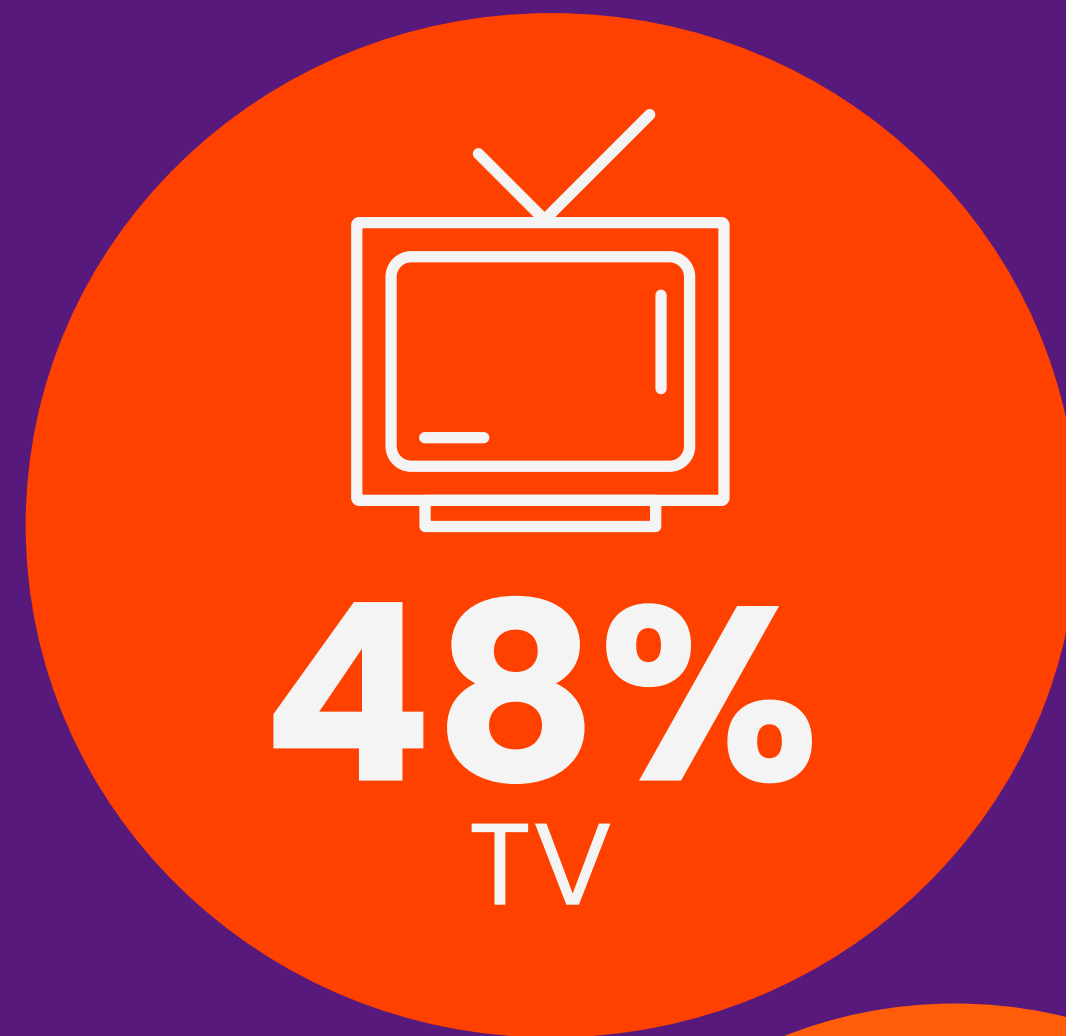


WE ASKED
Do you agree that advertisements with or about LGBTQ+ people feel authentic?



WE ASKED

If you recall seeing ads with or about LGBTQ+ people, where do you remember seeing or hearing about them?

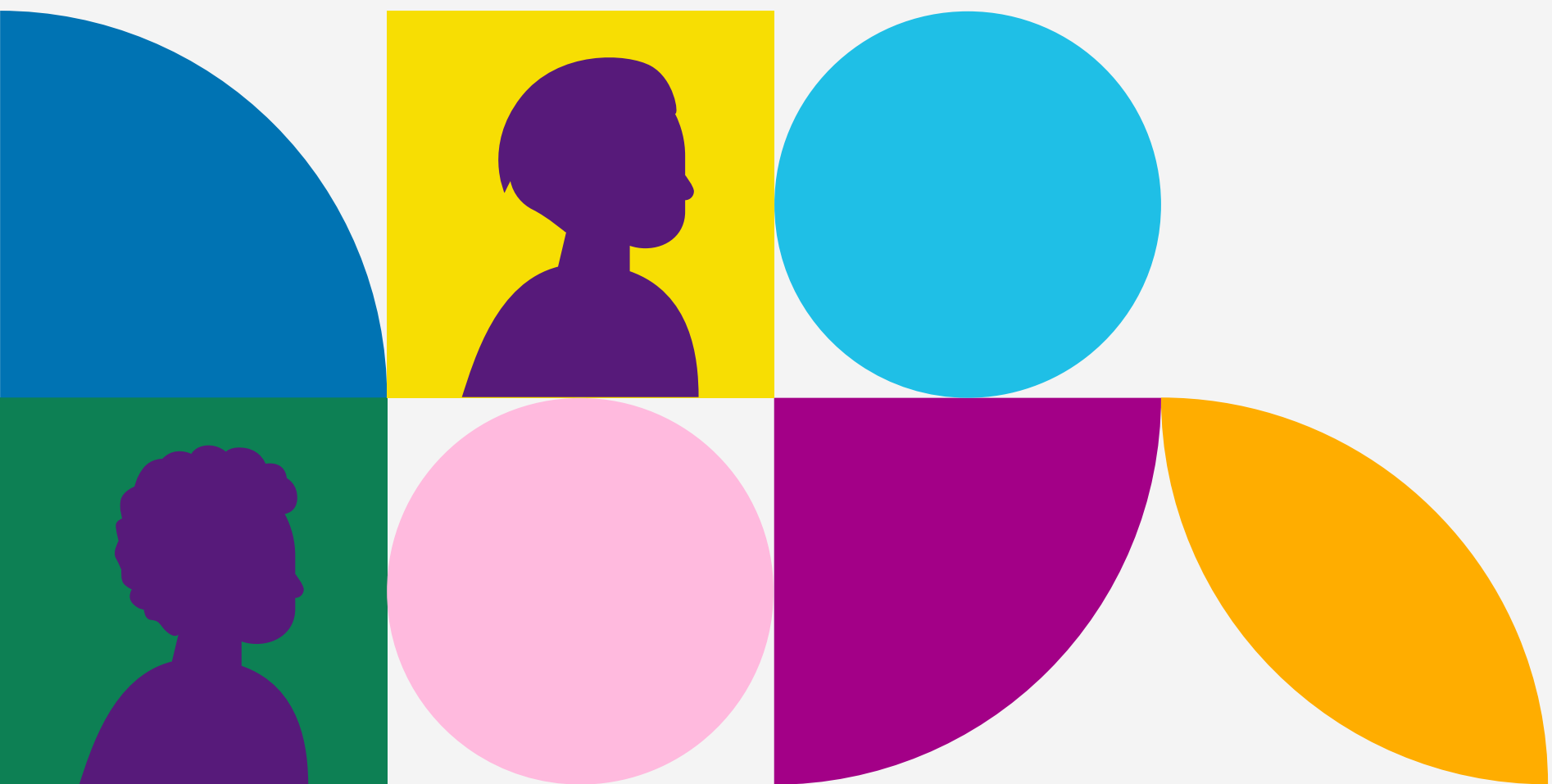


Inclusion that converts

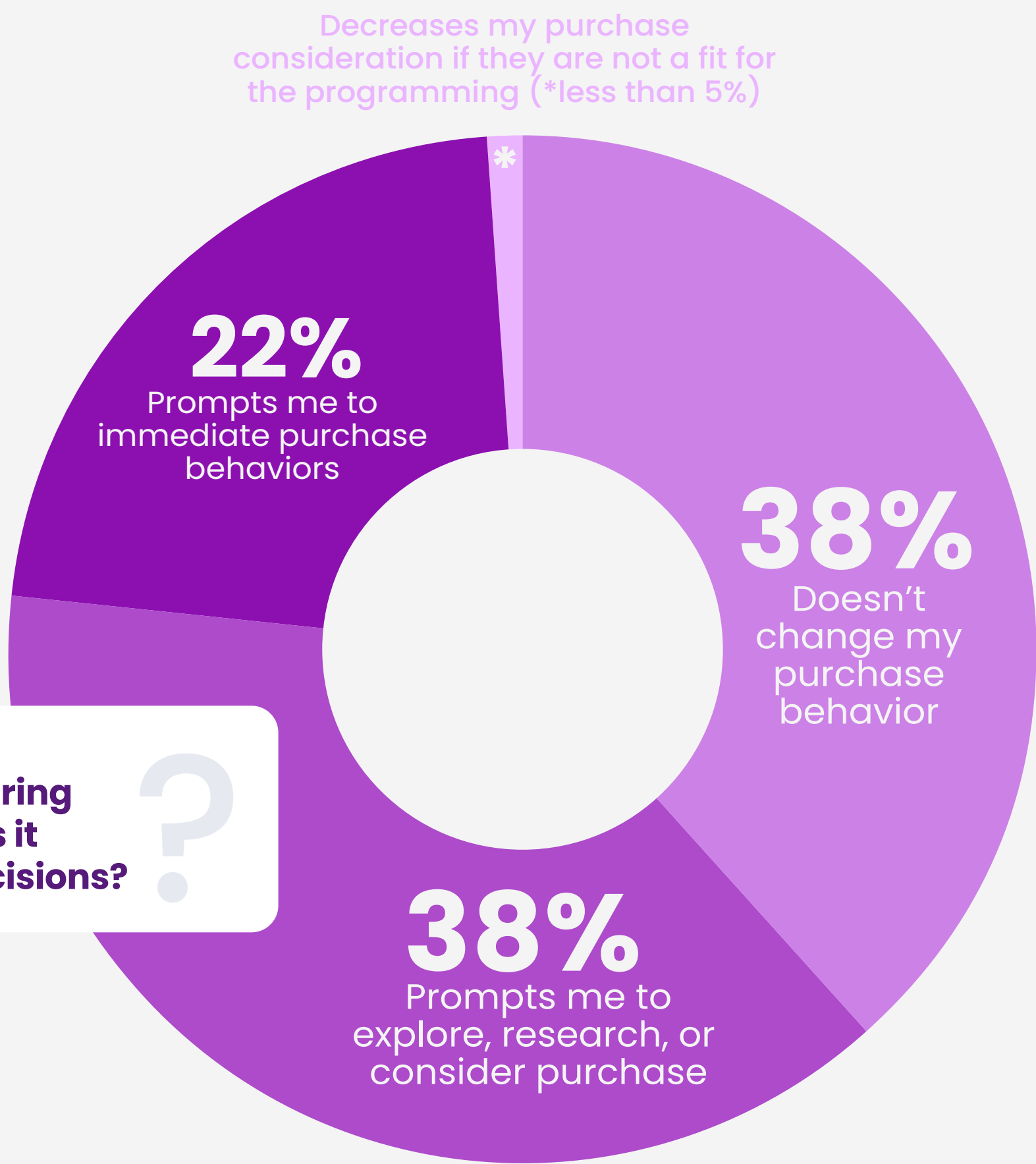
LGBTQ+ representation doesn't just shape perception—it drives business results. Sixty percent of all people who say they view LGBTQ+ content also say inclusive ads influence their purchase behavior, and that number goes up to 77% for LGBTQ+ people. Just 1% say it negatively affects their intent.

That influence holds even in a fragmented media landscape. LGBTQ+ viewers are more likely to recall seeing inclusive ads within the past week (41%), especially those in higher income brackets. And among those who do recall, TV is still the most common channel, though social media leads for LGBTQ+ people and Gen Z.

| **77%** LGBTQ+ people are influenced by inclusive ads



WE ASKED
When a brand advertises during LGBTQ+ media content, does it influence your purchase decisions?



Takeaways

Inclusion isn't seasonal, and consumers know the difference. In 2025, showing up for LGBTQ+ people means doing it consistently, credibly, and beyond the spotlight of Pride.

C-Suite

Inclusion beyond Pride is a leadership standard.

Brands that lead with year-round inclusion will have the best opportunity to attract and engage the LGBTQ+ community (\$3.9T in global buying power) and consumers who value LGBTQ+ advocacy.

Silence isn't neutral—it's noticed. As LGBTQ+ visibility declines across advertising, consumers are paying closer attention. Consistent representation signals resilience and reputational leadership when many are retreating due to political pressure—not consumer sentiment.

Your stance is your brand. In 2025, how you support LGBTQ+ communities, especially under pressure, defines your corporate integrity. Stakeholders see inclusion as a test of long-term vision and purpose.

Communications executives

Silence is risky. Substance is required. How and when you show up sends a message, with 56% of people saying brands shape how society perceives LGBTQ+ people.

Neutral reactions are an opportunity cost. Only 41% say LGBTQ+ ads feel authentic, and 36.5% are neutral. That's a signal to clarify your stance, elevate underrepresented voices, and show the people behind your story.

Match your channels to your message. Gen Z and LGBTQ+ audiences primarily see and trust LGBTQ+ stories on social, but TV and websites are still important. Prioritize earned and owned media where your audience listens.



Marketing executives

Representation is a core expectation. Visibility alone won't cut it—61% of LGBTQ+ consumers expect brands to affirm their DEI values vocally, while 87% want creative involvement from their communities in advertising.

Inclusive ads move the needle. Sixty percent of LGBTQ+ content viewers and 77% of LGBTQ+ people say inclusive ads impact their purchasing decisions. These are clear growth signals.

Treat LGBTQ+ inclusion like a commitment to your audience, not a seasonal campaign. Normalize visibility outside of Pride, using inclusive themes to strengthen positioning on freedom, innovation, and belonging.

Media planners

Meet audiences on the platforms they trust.

While TV remains #1 overall, LGBTQ+ and Gen Z recall LGBTQ+ ads most on social. Shift spend accordingly to maximize relevance, resonance, and reach.

Seasonal-only buys won't build equity.

Visibility outside of Pride creates white space for brand leadership. Extend inclusive media beyond "heritage moments" to build consistency and credibility.

Media is part of the message. Consumers notice where ads run. Strategic placement in LGBTQ+ content and culturally relevant moments amplifies authenticity and impact.



The cost of pullbacks

In the first two sections, we uncovered how consumers view DEI as a trust signal and LGBTQ+ inclusion as a baseline expectation—not a bonus. But what happens when brands reverse course? The data shows that DEI pullbacks carry real reputational and commercial risk, whether through silence, reduced visibility, or outright policy reversals. Consumers are not only watching, they're reacting with their wallets. In 2025, consistency is credibility. And pulling back, even quietly, can cost brands trust, loyalty, and long-term growth.

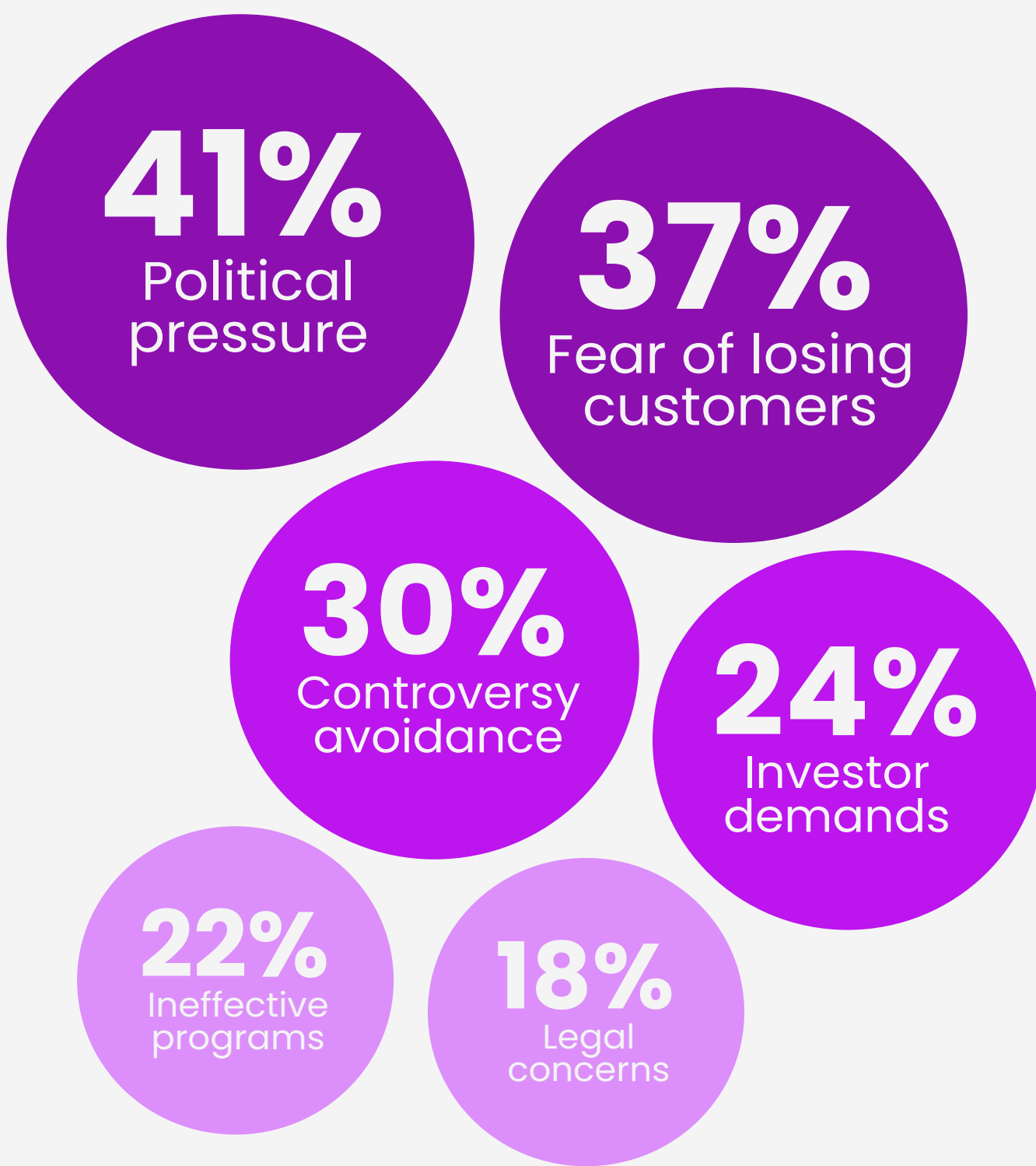
39%
already changed
their purchase
behaviors

Pullbacks break trust

When brands scale back DEI efforts, consumers notice—and react. Forty-one percent say their trust in brands declines with rollbacks of DEI commitments, while only 19% say their trust improves. And it doesn't stop at sentiment. Thirty-nine percent of people have already changed their purchasing behavior in the past three months due to DEI rollbacks, and the same number say they plan to do so in the next three months.

Additionally, consumers don't see these reversals as strategic. Only 22% believe organizations cut DEI programs because they're ineffective. Far more cite political pressure (42%) and fear of losing customers (37%). Companies must understand how their actions will impact their consumers and their wallets to avoid brand damage.

WE ASKED
What do you believe is the
primary reason companies
roll back DEI initiatives?



COST OF PULLBACKS

Silent attrition is the real risk

Vocal backlash gets headlines, but brands should fear quiet exits more. While 17% of consumers say they'd openly stop purchasing from a brand that rolls back DEI, another 24% say they would reduce or stop buying without saying a word. And rollbacks aren't a business strategy; only 5% say they would increase their purchases in response.

Gen Z and LGBTQ+ consumers are especially sensitive. Just 18.7% of LGBTQ+ people say DEI reversals have no impact on their trust, compared to 31.4% of the general population. Brands risk losing their most engaged and vocal audiences without proactive messaging and a values-led strategy.

41%
would
change their
purchase
behavior
due to DEI
roll back

5% Purchase more

22%
Make no changes

16%
Depends on the
policies changed

8% Seek more information
before deciding

7% Tell the company
about my concerns

15%
Reduce my purchasing

9% Stop purchasing
but keep it private

17%
Stop purchasing
and tell others

WE ASKED
If a company you frequently
purchase from rolled back DEI
policies, how would you respond?

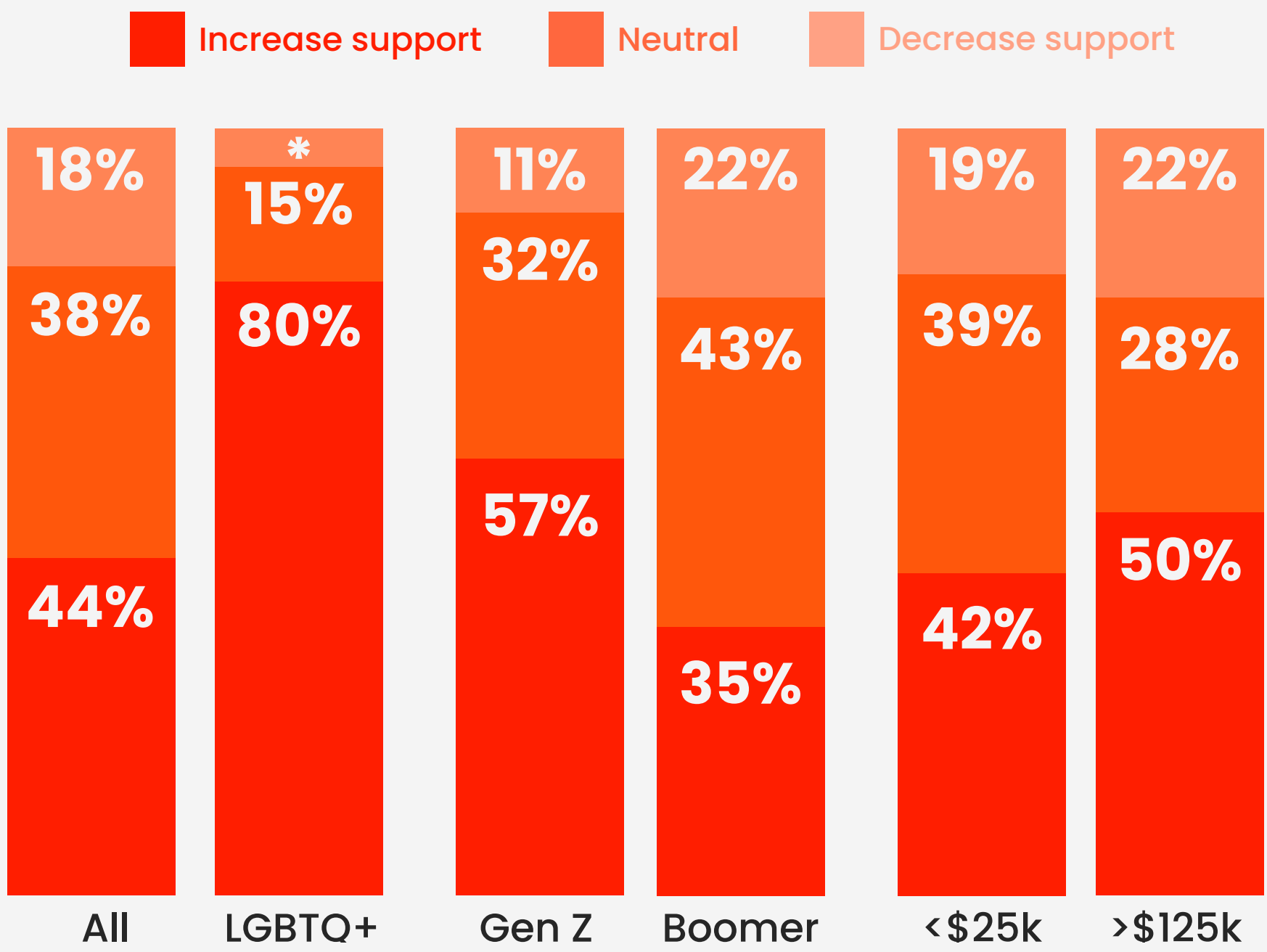


COST OF PULLBACKS

Holding the line builds loyalty

There’s commercial upside to consistency. Forty-three percent of consumers say their support increases when a brand maintains LGBTQ+ inclusion despite backlash. That number climbs even higher among Gen Z, LGBTQ+ people, and high-income earners.

In contrast, brands that retreat risk alienating their most loyal advocates. While some audiences—like Boomers—may take no action, younger consumers are far more likely to shift spending. The long-term value lies with those watching closely and willing to act.



WE ASKED

If a brand continues to support LGBTQ+ initiatives despite political backlash, how does this affect your support for the brand?



* less than 5%



COST OF PULLBACKS

Know who's watching and paying

Only 15% of LGBTQ+ respondents say pullbacks do not affect their support, compared to 31% of the general population. Gen Z is similarly responsive, with just 25% saying rollbacks don't impact their trust. These segments aren't just values-driven—they're purchase-driven.

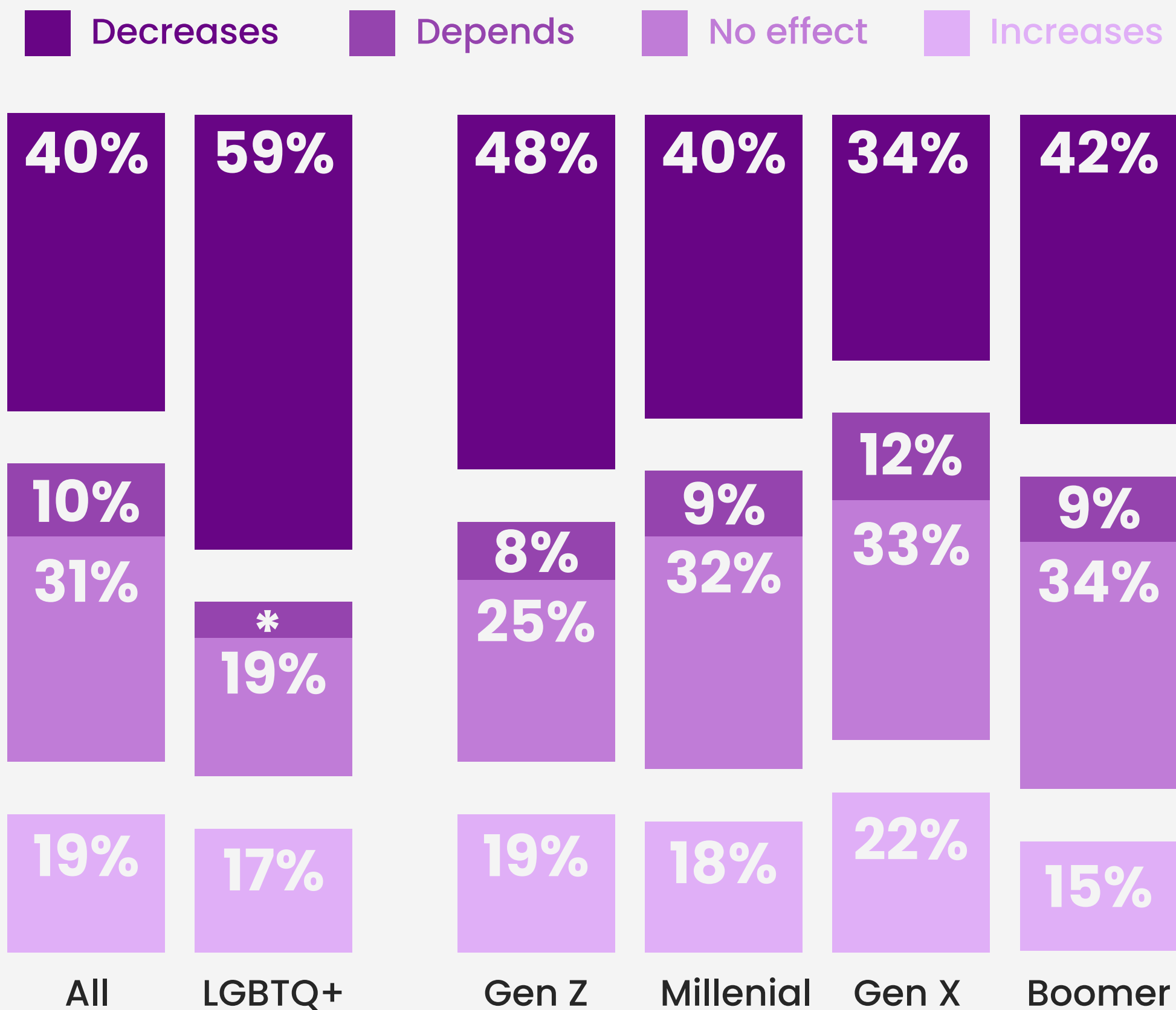
Adding to the challenge, 52.6% of people say they don't have a close LGBTQ+ connection. That makes brand behavior a powerful source of cultural understanding. Pullbacks don't just break trust, they cut off an opportunity to lead, educate, and connect.



WE ASKED
How does it affect your trust in a brand when they roll back DEI policies?



* less than 6%



Takeaways

Reversals cost more than they save. They reduce trust, erode loyalty, and disrupt purchase behavior, especially among LGBTQ+ and Gen Z audiences. But for brands that lead with transparency, resilience, and clarity, there's a long-term upside: stronger affinity, more advocacy, and a brand that can weather cultural shifts without losing its core.

C-Suite

Pullbacks cost trust and revenue. Forty-one percent of consumers say their trust declines when organizations roll back DEI, and 39% have already changed their purchasing behavior.

The silence is louder than the backlash. Only 5% of people say they'd reward a rollback. But 24% say they'd quietly reduce or stop buying. The bigger risk isn't outrage, it's attrition you can't explain.

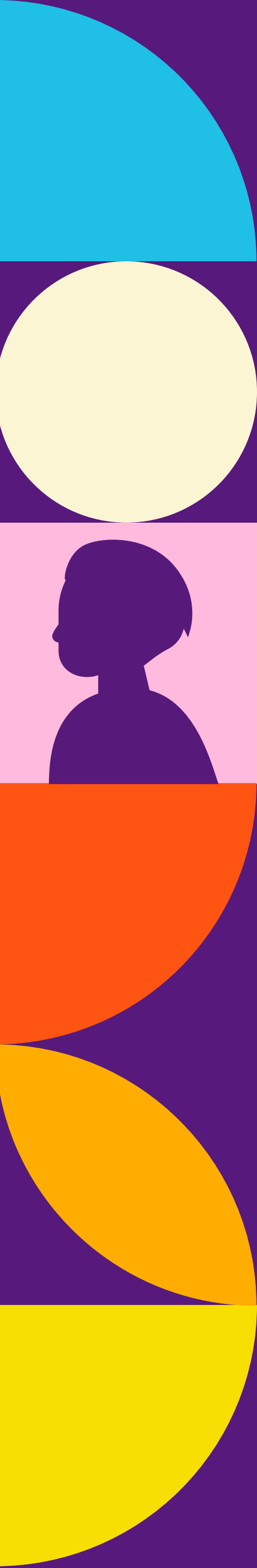
Consistency drives loyalty. Forty-three percent of people say they support brands more when they hold the line. That figure spikes among Gen Z, LGBTQ+ people, and high-income earners, who are your growth engine.

Communications executives

A quiet rollback is still loud. Consumers are paying attention to what brands don't say. Silence becomes a signal of retreat without messaging that explains and reaffirms commitments.

Trust breaks faster than it builds. Only 15% of LGBTQ+ people say DEI reversals do not affect their support. Repairing that trust will take far more than a future campaign.

Reputation lives in consistency. Your long-term credibility depends not on how you show up during celebratory moments like Pride, but how you hold your ground when it's hardest.



Marketing executives

Backtracking breaks the brand. Consumers interpret rollbacks as fear, not strategy. Only 22% believe DEI cuts are performance-driven; most see them as capitulation to pressure. Marketing leaders must go beyond optics—put your values in the bylaws, not just the brand book, to protect long-term commitments from short-term backlash.

Don't underestimate Gen Z. Forty-eight percent say DEI rollbacks hurt their trust. The Gen Z audience notices misalignment and responds with their wallets.

Lead with conviction, not caution. Sustained support is a differentiator. Holding firm during backlash earns advocacy, especially from your most engaged audiences.

Media planners

Pullbacks affect more than messaging—they affect media ROI. Audience trust shapes engagement. When trust drops, attention and conversion do too.

Stay visible where it matters most. Gen Z and LGBTQ+ audiences expect inclusion—and notice when it's missing. Pulling back spend risks long-term erosion in these segments.

Consistency beats re-entry, don't go dark. It's harder—and costlier—to win back trust than to sustain it. Evolve your strategy without disappearing from inclusive channels.



Advertising measurement with DISQO

Brand Lift & Outcomes Lift

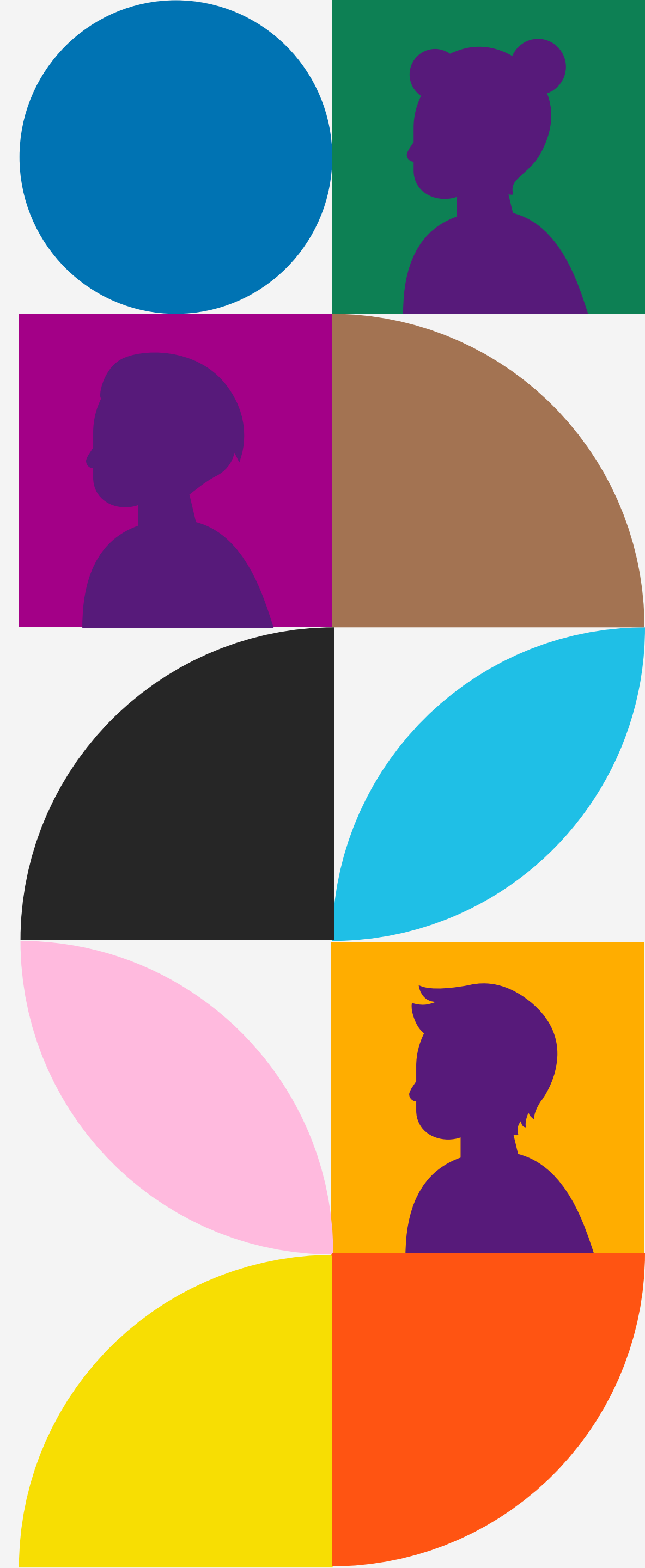
DISQO provides identity-based, holistic ad measurement. Our Brand Lift product enables cross-platform measurement of attitudinal lift on KPIs like awareness, consideration, and favorability. Our Outcomes Lift product uniquely adds measurement of post-ad exposure digital behaviors like search, site visits,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

Brand & 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 measures consumer actions after ad exposure once the consumer leaves your domain. This enables powerful conclusions about performance so you can get proper attribution for the efficacy of your media and ad formats.





Measure your ad effectiveness with DISQO

hello@disqo.com f  in

