



DIVERSITY IN ADVERTISING

ADOBE DIGITAL INSIGHTS 2019



Methodology

A total of 1,012 adults were surveyed in the USA, and 1,000 in the UK

US surveys were collected between May 16-22, 2019

UK surveys were collected between June 6-10, 2019

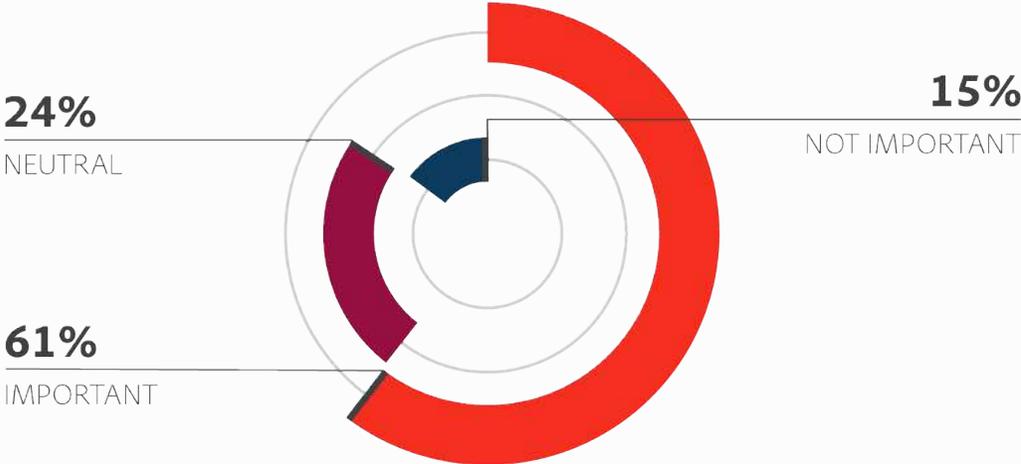
Diversity in Advertising | US Results



Diversity In Ads Generates Trust & Revenue

US Consumers believe in the importance of diversity in advertising, and they put their trust and dollars behind that belief

38% consumers are more likely to trust a brand that shows more diversity in its ads, and 40% of females are more likely to trust a brand with more diversity in their ads



ADOBE DIGITAL INSIGHTS 2019 IMPORTANCE OF DIVERSITY IN ADVERTISING TO CONSUMERS (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Nearly **1/3** of consumers (overall) are more likely to purchase products/services from brands with diverse ads, and over **50%** among LGBTQ+ and African Americans say they are more likely to purchase

Diversity In Ads Flow From Network TV

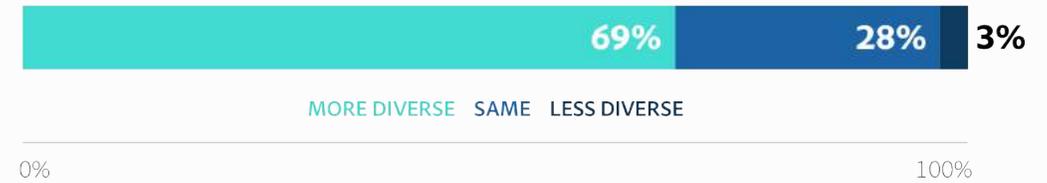
Consumers are recognizing the strides that brands are taking to be more diverse in their advertising. Over the past three years consumers are seeing more diversity in ads being served

One might think that Social Networks or Streaming Video Content providers would be the mecca for diversity in ads, but Network Television is the medium that Consumers see the most diversity in ads served

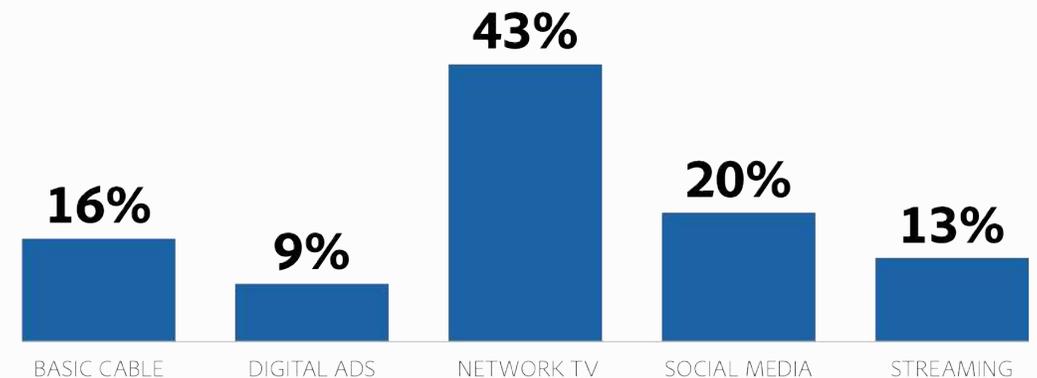
GenZ – Streaming 27%

Millennials – Social 29%

LGBTQ+ - Social 28%



ADOBE DIGITAL INSIGHTS
DIVERSITY IN ADS TODAY COMPARED TO 3YRS AGO (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019



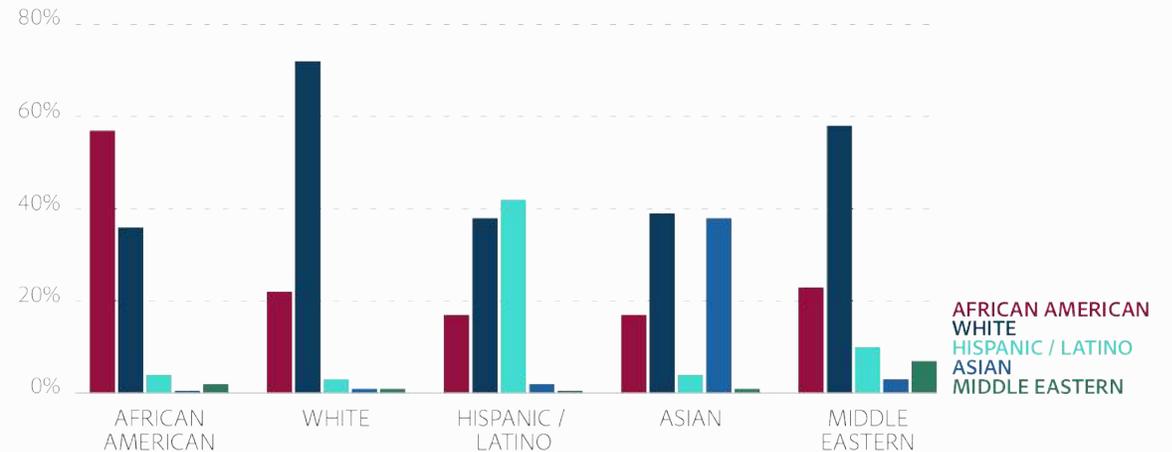
ADOBE DIGITAL INSIGHTS
WHICH VIDEO DELIVERY MEDIUM DO CONSUMERS SEE THE MOST DIVERSITY IN ADVERTISING? (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Are We Doing Enough?

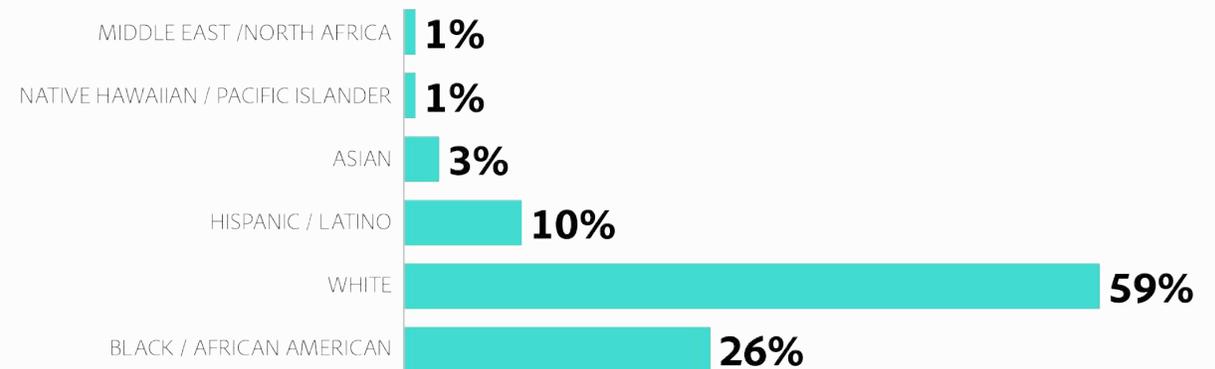
74% of white consumers said that they feel their race/ethnicity is represented in the ads they are served – but this figure drops when the question is asked of other population groups

Asian and Middle Eastern populations in the United States feel that they see ads featuring Caucasian models more frequently than ads featuring images of people from their racial groups – brands need to do more work personalizing ads to these populations if they are to secure deeper and more engaging consumer relationships

Consumers overall are seeing white as the most portrayed race/ethnicity in current ads (59%), and males filling the most portrayed gender role



ADDOBE DIGITAL INSIGHTS 2019 WHAT RACE/ETHNICITY DO YOU CURRENTLY SEE PORTRAYED THE MOST IN ADVERTISING? (US, 2019) SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019



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Transparency & Trust Will Aid In Eliminating Advertising Guesswork

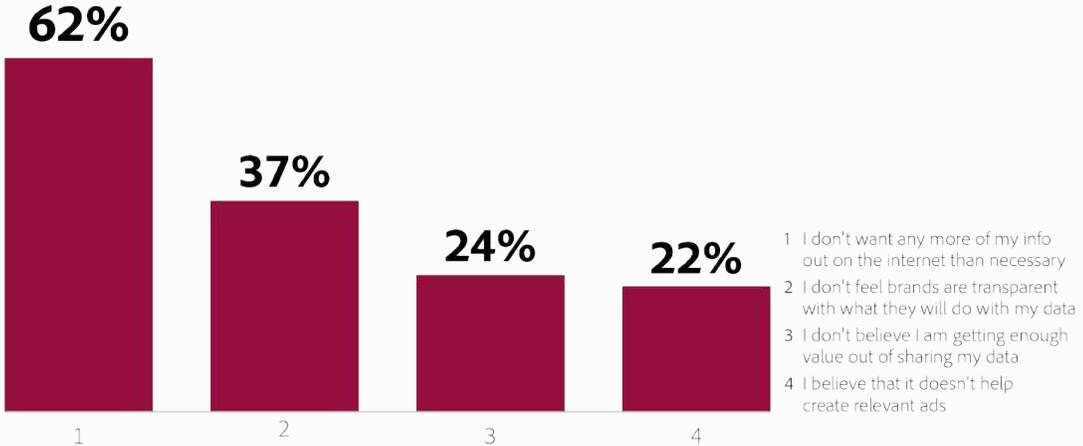
Accurately targeting and representing your consumers can be difficult, over 50% of all consumers opt-out of sharing data with brands they have purchased from

Among the highest

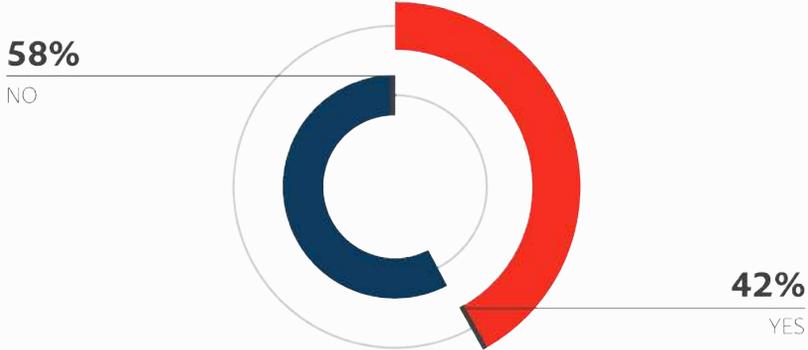
- 62% - African American
- 57% - Middle Eastern

Despite African American populations being least likely to share personal data, they are also the population group that **would** be most willing be willing to share more data if given a reason to do so. Brands have an opportunity to secure more data to deliver personalized experiences if they give diverse populations a reason to do so by being trustworthy and transparent

- 63% - African American
- 59% - LGBTQ+
- 55% - Hispanic



WHY DO CONSUMERS OPT-OUT OF SHARING THEIR DATA, WITH BRANDS THEY PURCHASE FROM? (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019



ARE CONSUMERS WILLING TO PROVIDE MORE PERSONAL DATA (INCOME, MARITAL STATUS, RELIGION) TO A BRAND, IF IT MEANT MORE DIVERSITY IN ADS? (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Inaccurate Representation Leads to Customer Departure

Perception is a precursor to an engaged customer or a disengaged visitor – brands may produce diverse creative, but if they aren't reaching diverse populations through effective delivery, targeting and personalized experience, then they will struggle to achieve success

Creating and effectively targeting ads that reflect a brand's diverse communities is critical. Many consumers have stopped supporting brands due to non/misrepresentation

- LGBTQ+ - 58%
- African American - 53%
- Hispanic - 40%
- Middle Eastern - 38%



ADOBE DIGITAL INSIGHTS 2019
 DOES A BRAND'S DIVERSITY OR LACK THEREOF IMPACT YOUR PERCEPTION OF THEIR PRODUCTS OR SERVICES? (US, 2019)
 SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019



ADOBE DIGITAL INSIGHTS 2019
 HAVE CONSUMERS EVER STOPPED SUPPORTING A BRAND BECAUSE IT DIDN'T REPRESENT THEIR IDENTITY (RACE, GENDER, RELIGION, ETC) IN IT'S ADVERTISING? (US, 2019)
 SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Industries And Brands That Consumer See As Diverse Advertisers

Of the consumers who said that the food industry offers more diversity in their ads, 52% have graduated college or have a post-graduate degree

With the exception of retail, needs (such as food, healthcare and education) do a much better job reaching diverse populations than wants (retail being the only industry in the top five) – the more required a product or service is in life, the more likely it effectively reaches and personalizes to diverse populations

Despite the above, the brands at the top of consumers' minds for diversity in their ads are more designed to appeal to consumer desire than consumer necessity:

African Americans - Nike 50%

Hispanic/Latino – Nike 47%

33% - Food

30% - Healthcare

30% - Retail

29% - M&E

25% - Education

34% - Nike

32% - Coca Cola

29% - Google

25% - Apple

20% - Dove

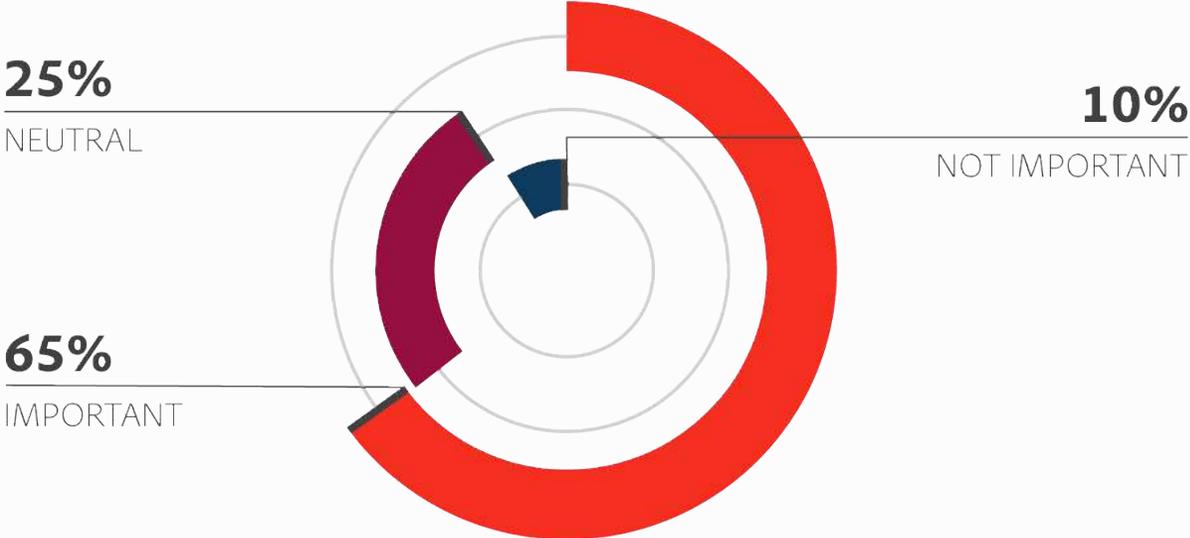
Diversity in Advertising | UK Results



Diversity In Ads Rouses Trust & Conversion

UK consumers say that diversity in advertising is important to them, so much that they are more likely to trust and purchase from a brand with diverse ads

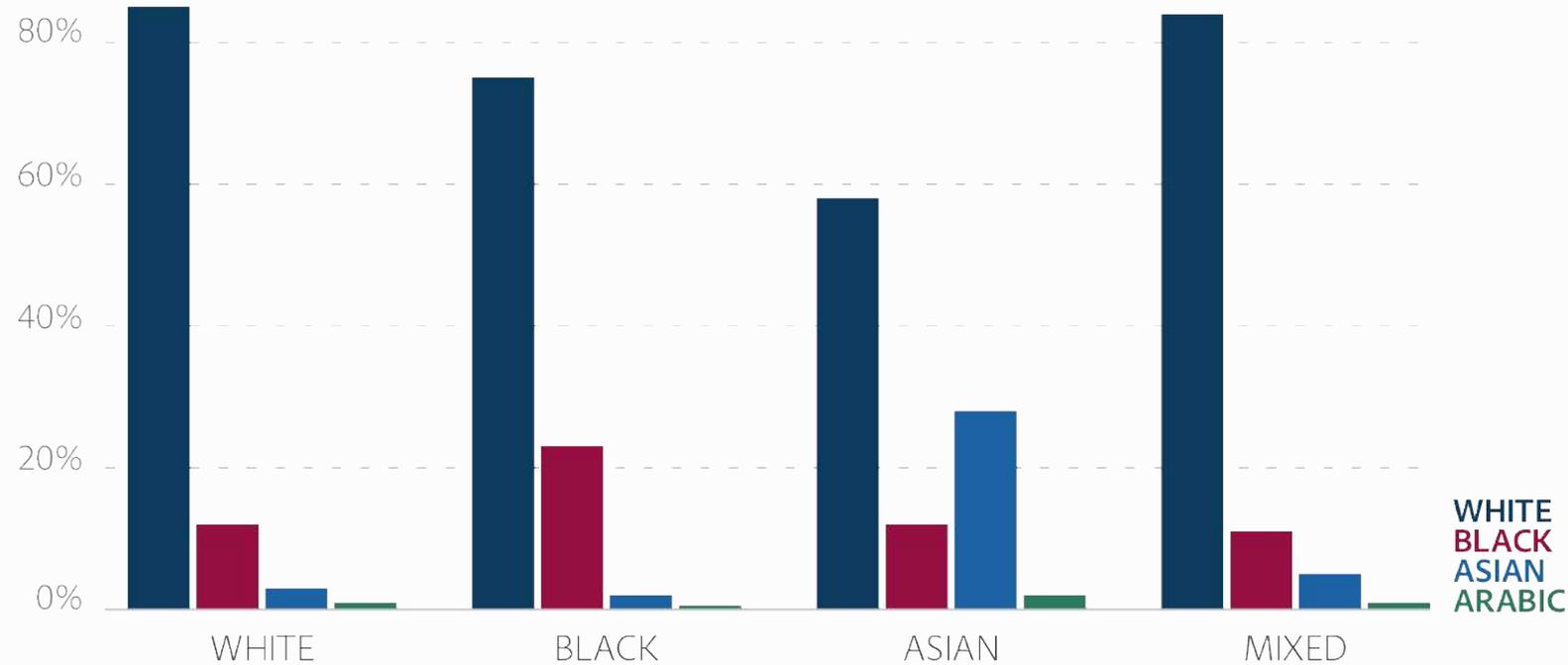
33% consumers are more likely to trust a brand that shows more diversity in its ads, 50% in the LGBTQ+ community are more likely to trust



ADOBE DIGITAL INSIGHTS 2019 IMPORTANCE OF DIVERSITY IN ADVERTISING TO CONSUMERS (UK, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

26% of consumers (overall) are more likely to purchase products/services from brands with diverse ads, and nearly **40%** among LGBTQ+ and Blacks say they are more likely to purchase

Ad Diversity In The UK Is A Bit One Sided



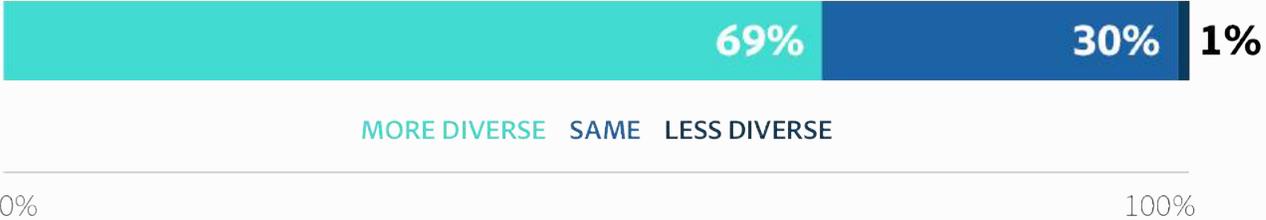
WHAT RACE/ETHNICITY DO YOU CURRENTLY SEE PORTRAYED THE MOST IN ADVERTISING? (UK, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Consumers in the UK across all race/ethnicities see white as the most portrayed race/ethnicity. Males were the most portrayed gender role at 46%

Contrary to the US where up to 40% of African Americans saw their race portrayed in ads, UK consumers rarely acknowledge, are targeted by, or view ads featuring ethnically diverse creative

Free-To-Air Stands A Top The Most Diverse Ad Medium In The UK

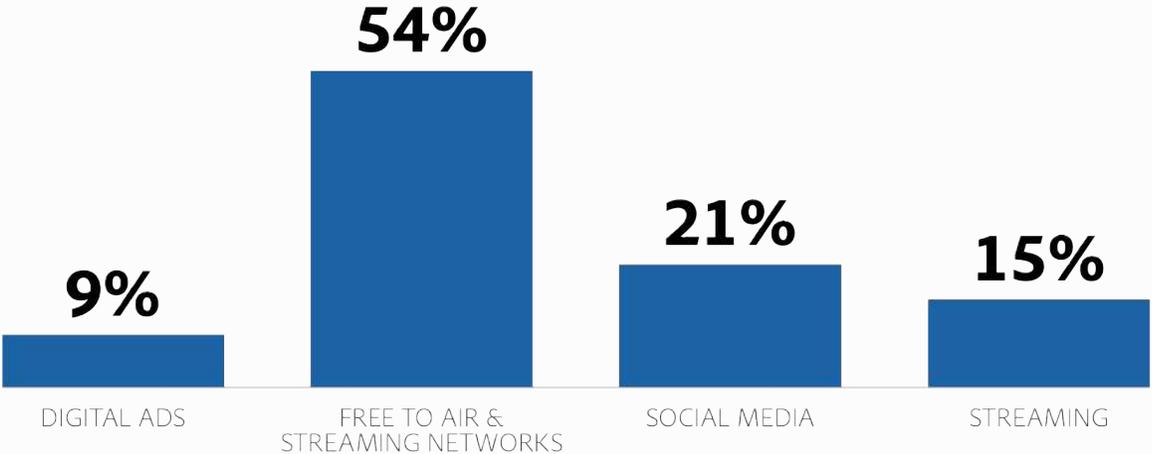
UK consumers are seeing more diverse ads than ever before, over 2/3rds of consumers recognize the increase in brands efforts to include more diversity in their ads



ADOBE DIGITAL INSIGHTS 2019 DIVERSITY IN ADS TODAY COMPARED TO 3YRS AGO (UK, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Free-to-air & Streaming networks stands atop the most diverse video advertising medium. GenZ is the only generation that attributes more ad diversity to Social

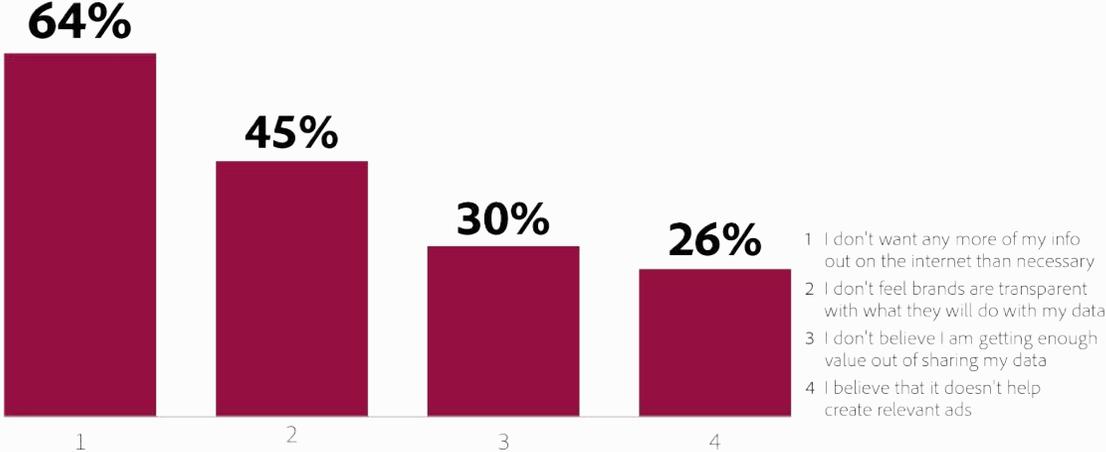
GenZ – Social 40%



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Opt-outs Can Create An Advertising Conundrum

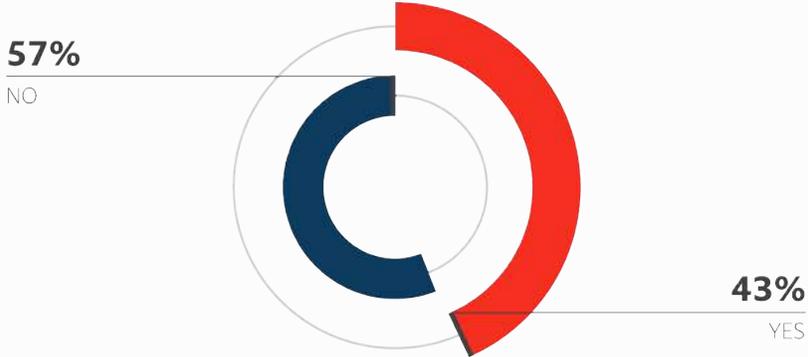
Over half of UK consumers actively opt-out of sharing their personal data with brands they purchase from. The race/ethnicities that are among the highest are Mixed Race (62%), and Asian (62%)



WHY DO CONSUMERS OPT-OUT OF SHARING THEIR DATA, WITH BRANDS THEY PURCHASE FROM? (UK, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Just as in the US, racial groups that most frequently opt-out of data sharing are also high on the list of population groups that would be willing to share more data if given more reason to do so by brands

- 63% - Black
- 59% - Asian
- 52% - Mixed Race



ARE CONSUMERS WILLING TO PROVIDE MORE PERSONAL DATA (INCOME, MARITAL STATUS, RELIGION) TO A BRAND, IF IT MEANT MORE DIVERSITY IN ADS? (UK, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Failure to Represent Can Result In Customer Spurn

A large majority of UK consumers advised that their perception of a brands' product or service is impacted by their advertising efforts



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Overall almost a quarter of UK consumers have stopped supporting a brand because it failed to represent their identity, this number jumps significantly when we look into different communities

- Black- 46%
- Asian - 35%
- LGBTQ+ - 33%



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Industries And Brands That Consumer See As Diverse Advertisers

Of the consumers who said that the retail industry offers more diversity in their ads, 40% have an undergrad or post-graduate degree. Unlike the US, UK consumers are targeted and engaged with effectively by more consumer wants (such as retail and travel) than needs (such as food and healthcare).

The brands at the top of consumers minds for diversity in their ads

- Black - Nike 32%
- Asian – Apple 27%
- Mixed Race – Nike 36%

- 29% - Retail**
- 28% - M&E**
- 26% - Food**
- 24% - Healthcare**
- 22% - Travel & Hospitality**

- 20% - Coca Cola**
- 19% - Nike**
- 17% - Apple**
- 16% - Tesco**
- 15% - Marks & Spencer**

Appendix

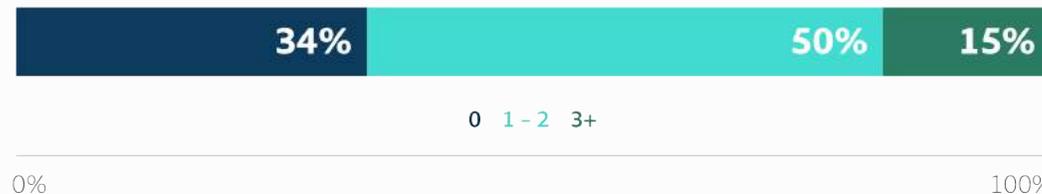
A Closer Look At Video Streaming In the US

1/3 of US consumers advise that they do not have any streaming services, 50% have 1-2 services, and 15% have 3+ services

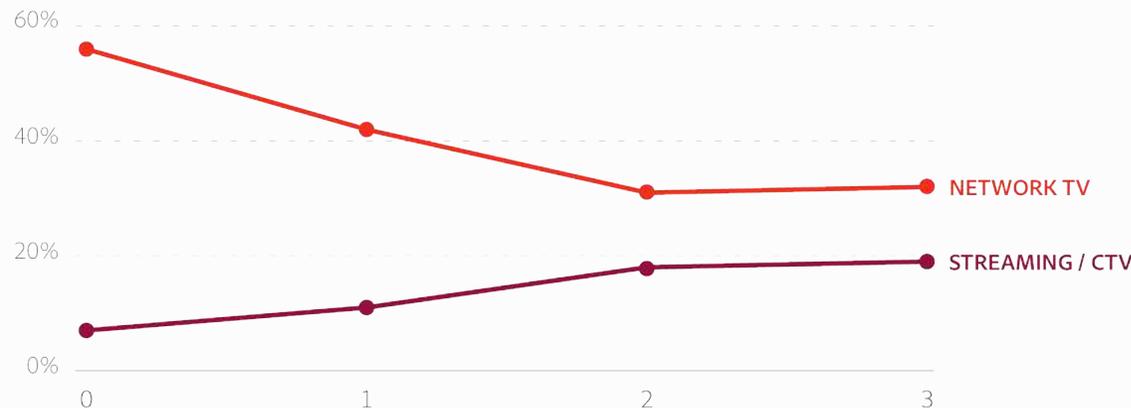
Younger generations typically have more sub services for video content
LGBTQ+ community are heavy subscribers to video content

- 0 – 20%
- 1-2 – 48%
- 3+ -29%

The more video sub services that consumers have the stronger the correlation to “streaming” being a diverse ad medium



ADOBE DIGITAL INSIGHTS 2019 HOW MANY DIFFERENT VIDEO CONTENT SUBSCRIPTIONS DO YOU CURRENTLY HAVE? (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019



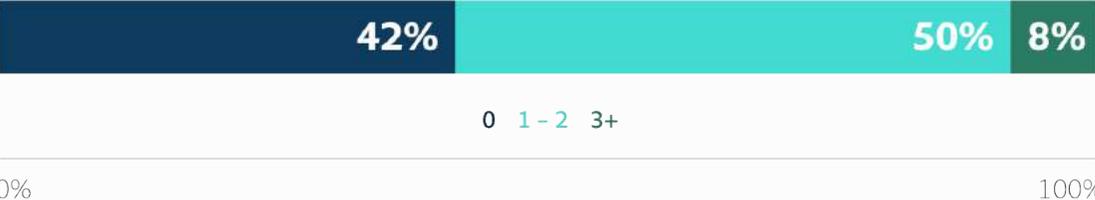
ADOBE DIGITAL INSIGHTS 2019 HOW MANY VIDEO SUB SERVICES DO YOU CURRENTLY HAVE, AND WHICH MEDIUM DO YOU SEE AS THE MOST DIVERSE IN ADVERTISING? (US, 2019)
SOURCE: ADOBE DIVERSITY IN ADVERTISING SURVEY 2019

Video Content Streaming Services In The UK

42% of UK consumers advise that they do not have any streaming video content services, 50% have 1-2 services, and 8% have 3+ services

LGBTQ+ community are heavy subscribers to video content

- 0 – 32%
- 1-2 – 59%
- 3+ - 10%



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Younger generations typically have more sub services for video content

# of Video content Subscriptions	Generation Z	Millennials	Generation X	Baby Boomers	Traditionalists
0	14%	15%	39%	59%	78%
1-2	75%	69%	58%	36%	20%
3+	12%	16%	3%	4%	3%



MAKE IT AN EXPERIENCE