

Perceptions of Progress: The State of Women's Equality in the US

Differences in
Perception By
Gender



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About the Study



The SeeHer mission is to 'accurately portray all women and girls in marketing, advertising, media and entertainment so they see themselves as they truly are in all their potential.' To this end, SeeHer is committed to creating thought leadership that can shine a light on how we as an industry can continue to impact gender equality in media.

As part of its core values, dentsu shares an unwavering commitment to this same mission. Additionally, as a leader in the advertising industry, dentsu is acutely aware of how representation influences reality.

With those shared values in mind, SeeHer and dentsu have collaborated on a proprietary research study, *Perceptions of Progress: The State of Women's Equality in the US*, to understand consumers' attitudes around the importance, progress and barriers to gender equality. This report is to be the first in a series. This edition provides an overview of the survey findings overall and parses out the differences in perception by gender. Subsequent reports will explore the results by ethnicity/race and generational cohorts.

Both dentsu and SeeHer are keenly aware of the power of concrete data and actionable insights to impact and inspire lasting change. In conducting this study we wanted to probe into questions such as: Is gender equality an equally important an issue for men as it is for women? What is the sense of progress against the issue? What barriers do men and women believe stand in the way of gender equality? How can marketers play a role? It is our hope that the findings help illuminate the actions we - as the marketing community and as individuals - can take to further equality.

Survey Methodology

The survey was administered through Toluna, an online research panel, on August 21st, 2020. Conducted by dentsu, this survey was distributed among a random sample of 800 respondents, aged 18-65 years old and residing in the United States. The survey garnered an equal number of male and female respondents and controlled for nationally representative weighting across age and ethnicity (using latest publicly available US Census numbers).

Executive Summary

Four Key Disconnects

The following report uncovers a series of four key disconnects between Americans' perceptions of the state of gender equality and the reality of women's experiences. Ultimately, the report aims to offer a point-of-view on how media, brands and consumers can work to bridge those gaps on the path towards equality.

01

Hope for the future vs. confidence in actualization

While Americans are optimistic about progress being made towards gender equality and even believe the next decade will see more female leaders, they also sense that we are far from true equality. Men and women express different views about the state of equality, stemming from misalignment as to what the actual barriers to equality are.

02

Importance of women's equality vs. who is responsible for creating change

All Americans agree that women's equality is an important issue to them. Surprisingly, both men and women are more likely to say that women should shoulder greater responsibility than men in achieving a more equal society.

03

The potential of media to advance women's equality vs. the current state of representation

Americans see the media as uniquely able to positively impact gender equality through the better representation of women. Yet, satisfaction with the current state of representation is low, especially among women.

04

What brands deliver vs. what consumers want in terms of gender equality

The involvement of brands - as both marketers and employers - is seen as crucial to creating an equal society. However, consumers say brands and companies are not doing enough to support gender equality.

Disconnect 01

Hope for the future vs. confidence in actualization



In recent years there has been increased energy around the issue of gender equality in the United States. Today, almost 9 in 10 respondents (88%) express hopefulness about women’s equality in the country (Figure 1).

Additionally, the overwhelming majority of Americans express strong confidence that the next decade will see more female leaders in male-dominated arenas: 86% and 89% of respondents are confident more women will rise to the top in business and politics, respectively (Figure 1).

However, fewer Americans express confidence that true equality is close to being achieved. In fact, only

40% of respondents “strongly agree” that equality will be achieved in their lifetime and a full quarter are skeptical (Figure 1). This presents a departure from consumers’ hope around the current state of equality and indicates that even with strong progress in the next decade, Americans feel there is a long way to go.

Indeed, the World Economic Forum recently projected that it will take 151 years to close the existing gender gap (with regards to economic opportunity and financial parity) in the US¹. It is also worth noting that COVID-19 is having a profoundly detrimental impact on women’s equality. McKinsey estimates that women are 1.8 times more vulnerable to the pandemic’s impact than men².

Figure 1

American Sentiment Regarding Gender Equality: Present & Future

■ Very discouraged ■ Somewhat discouraged ■ Somewhat hopeful ■ Very hopeful

“How do you feel about the current state of women’s equality in the US?”



■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree

“I have confidence that the next decade will see more women leaders in Business.”



“I have confidence that the next decade will see more women leaders in Politics.”



“I have confidence that gender equality will be achieved in my lifetime.”

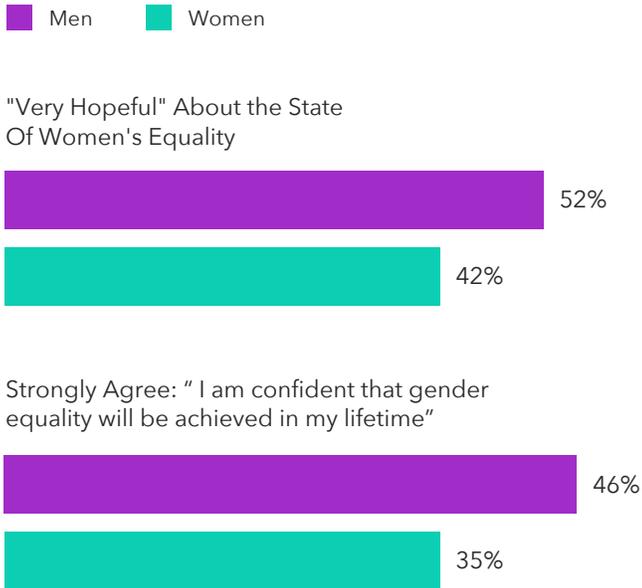


¹ World Economic Forum, 2020

² McKinsey, COVID-19 & Gender Equality, 2020

Figure 2

American Sentiment Regarding Gender Equality: Men vs. Women



Given the current climate, it's not surprising that women feel more cautious about the state of equality and are more attuned to existing barriers.

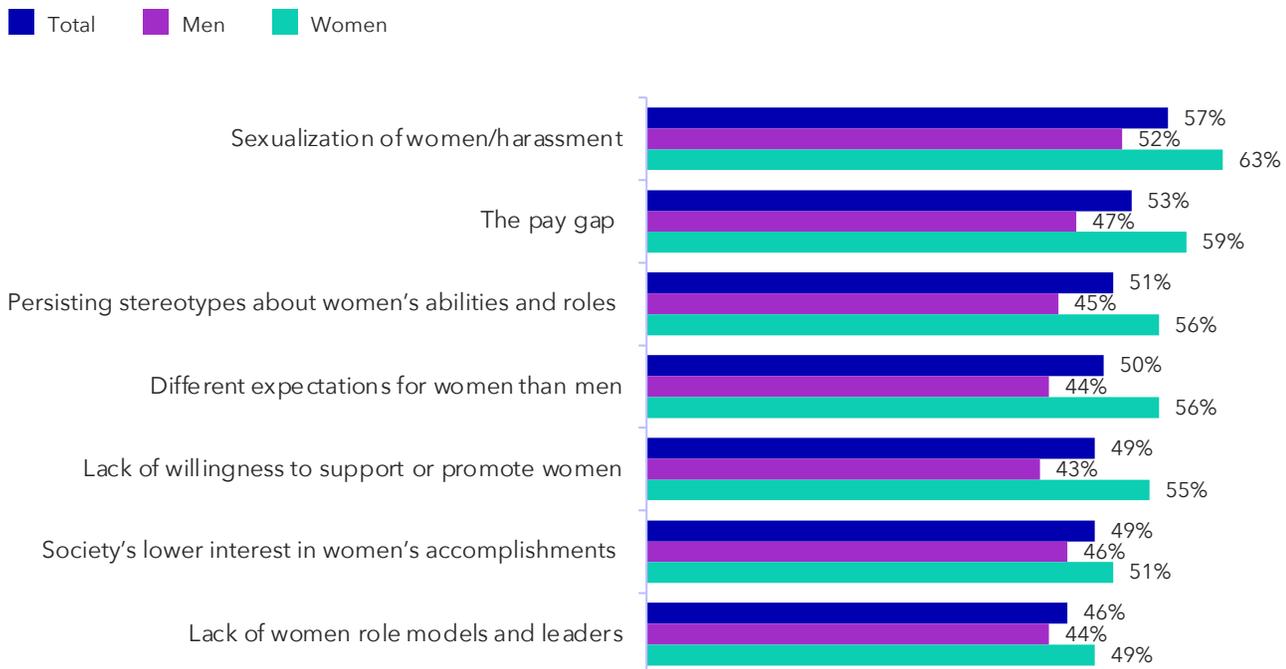
As the ones living and experiencing inequality, women report feeling less hopeful and less confident than men about the current state of gender equality and the prospect of achieving parity within their lifetimes (Figure 2).

In looking at which barriers remain it is clear why women feel more cautious. Overall, women are more likely than men to say that they continue to face a variety of barriers to equality (Figure 3). Sexualization/harassment and the pay gap are the top two barriers named by both men and women; however, women see more urgency around these issues.

Equal opportunity starts with identifying what stands in the way of achieving it. As the study shows, modern sexism and gender inequality can exist while appearing invisible, particularly to those who do not experience it. Until this disparity in perception is addressed, progress towards equality may remain stymied.

Figure 3

Existing Barriers To Equality For Women in the US





Strategies For Change:
**Hope for the future vs.
confidence
in actualization**



Translate conversation into action. Consumers are hungry for progress towards gender equality, yet there is a sense that true equality is a long way from the current reality. There needs to be a more deliberate translation of conversation around gender equality into action.

Men need to join the fight for gender equality. To challenge the systems that create barriers for women, men need to have a greater understanding of the issues that women face, both on a day-to-day level as well as systemically. Bridging this gap in perception requires education and intentional messaging. Without direct outreach to men, they may not be able to recognize the role they play and the privileges they hold. Together with women, men need to join the effort in carving a path towards a common goal with an urgency for change.

Disconnect 02

Importance of women's equality vs. who is responsible for creating change

Women’s equality is an important personal issue to most Americans, with 73% of both men and women in agreement on this. Yet surprisingly, both genders are more likely to assign the responsibility of improving equality to women: 58% say that women hold ‘a lot’ of responsibility to do so while only 50% say the same for men.

It is interesting that women are also placing more of the burden to improve equality on themselves (Figure 4). It speaks to our tendency as a society to expect more from women and how systems of bias can be internalized even among those whom the system does not benefit.

The study shows that by no means do men and women think gender equality is solely a “women’s issue.” Yet, it is problematic that more of the burden is being placed on women. Only men and women together can create an equal society and men must be active participants to help dismantle patriarchal barriers.

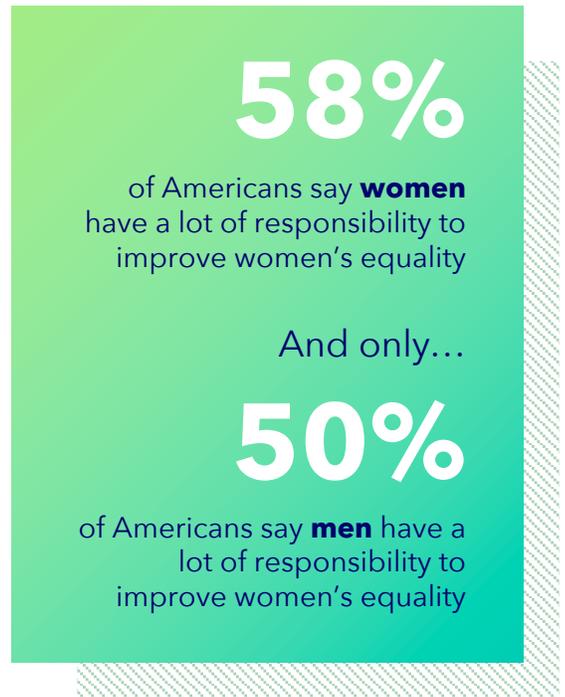
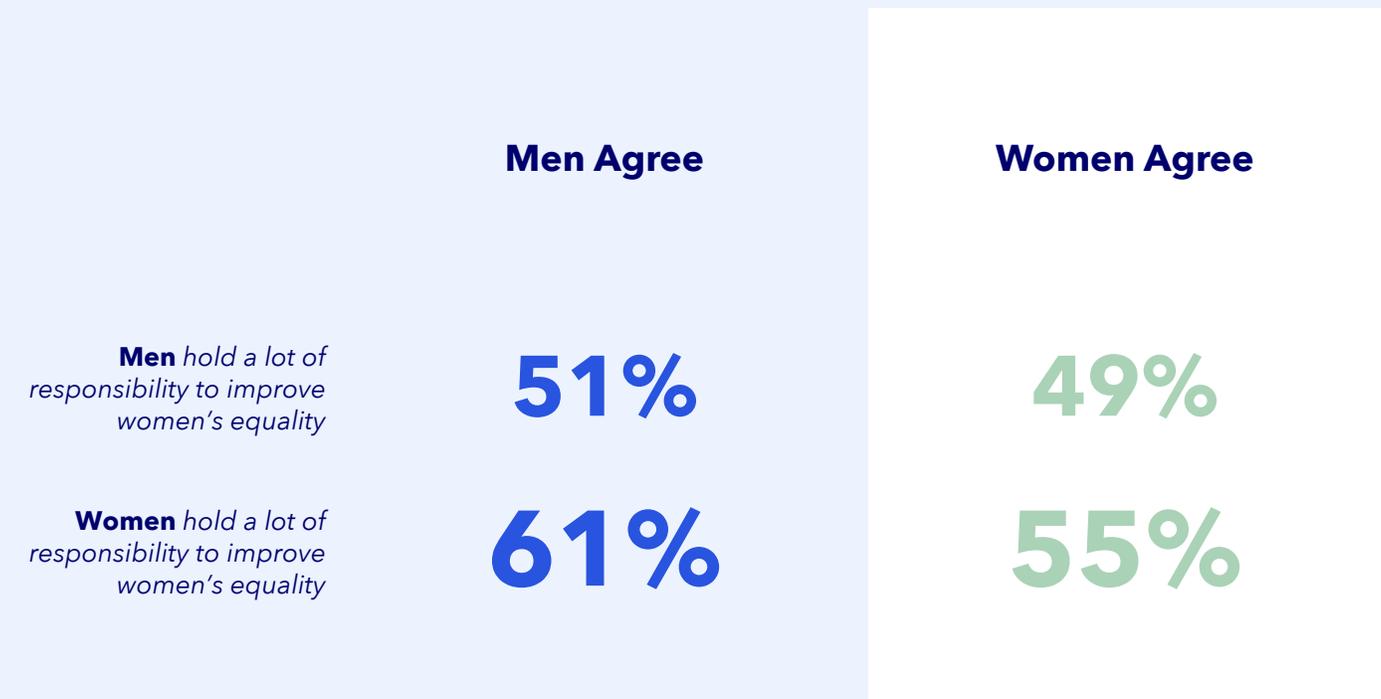


Figure 4

Placing Responsibility for Gender Equality: Men vs. Women

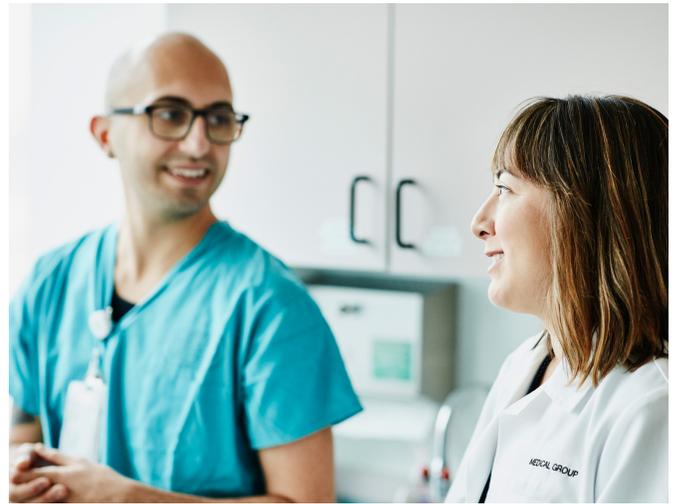


Strategies For Change:

Importance of Women's Equality vs. Who Is Responsible For Creating Change

Champion male voices within the gender equality conversation. It is no secret that some men may feel hesitant to participate in discussions of gender equality - whether through fear of saying something offensive or apathy that the conversation doesn't concern them. In reality, their voices are critically important in championing and affecting change. Creating opportunities - such as panel discussions - for men to speak out on gender issues in conjunction with women offers a safe avenue to help men feel more comfortable with their role in creating a more gender equal society.

As shapers of cultural norms, brands and companies can help shift public attitudes and behaviors by engaging men as allies. Brands and companies should shift their representation of men to highlight those who are actively engaged in the fight for gender equality. In media and advertising, this means going beyond simply showing a man in a stereotypically "female role" (i.e. dad doing laundry) to portraying the myriad of ways men can make a real difference at work and at home (promoting women's ideas at work, being a partner that truly shares equal responsibility in housework/child care).



Disconnect 03

The potential of media to advance women's equality vs. the current state of representation

Americans see media as uniquely positioned to positively impact gender equality through the better representation of women. Over half (52%) of respondents say media has **a lot of responsibility** to improve equality.

This charge stems from a perception that media both influences society and individuals: 81% agree that "media plays a crucial role in shaping gender roles" and 84% agree that "media has the power to teach children that girls can do anything that boys can do." It's clear that consumers believe that media plays a powerful role in how women and girls see themselves and in shaping how society views them.

Yet, only 40% of respondents say that the media has made "a lot of progress" to better represent women over the past 10 years (Figure 5).

Consumers feel media is challenged to reflect women fairly: only one-third of respondents feel media usually does a good job of accurately portraying women (Figure 6).

The biggest issue appears to be a failure to fully capture women's capabilities (Figure 7), with 72% of respondents saying they typically see women portrayed by media as attractive rather than accomplished. There is an appetite for more inclusive and accurate representation of women to help enable them to reach their full potential in the world. As SeeHer mantra states, "if you can see her, you can be her."

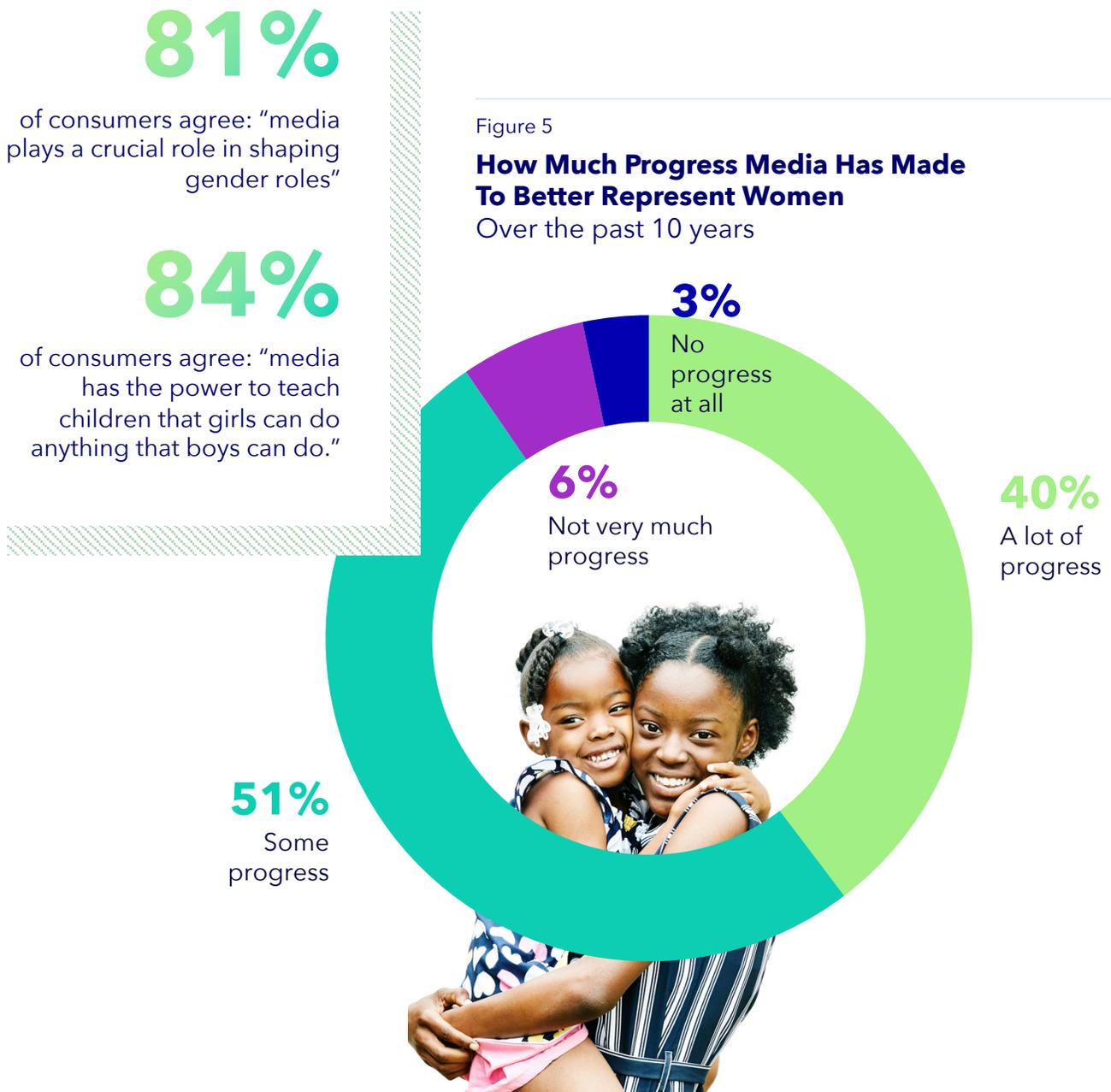
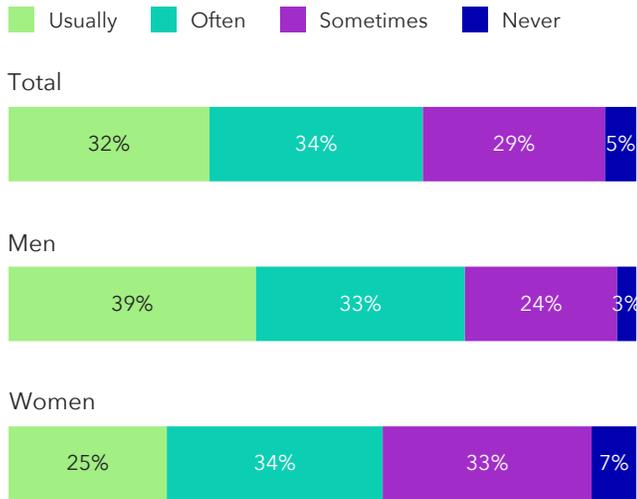


Figure 6

How Often The Media Accurately Portrays Women



Women are less satisfied than men with current media representation of women.

Both men and women equally charge media with 'a lot' of responsibility in the achievement of women's equality (52%, respectively). However, women are less likely than men to say media usually portrays them accurately (Figure 6).

There is also a noticeable discrepancy in how men and women feel women are typically portrayed by media (Figure 8). Women are more likely to say they most often see depictions of women that reinforce gender stereotypes. Men have a more balanced interpretation. They are more likely to think women are typically portrayed as leaders, as assertive and as strong, rather than as caretakers, as submissive or as dainty. An underlying cause may be that men and women hold different conceptions of what constitutes an 'accurate' portrayal of women.

Figure 7

Women are more often portrayed by media as...

Leaders 48%	Caretakers 52%
Assertive 53%	Submissive 47%
Strong 62%	Dainty 38%
Accomplished 28%	Sexy/attractive 72%
In a leading role 46%	In a supporting role 54%

Figure 8

According to women, women are more often portrayed by media as...

Leaders 40%	Caretakers 60%
Assertive 45%	Submissive 55%
Strong 56%	Dainty 44%
Accomplished 29%	Sexy/attractive 71%
In a leading role 37%	In a supporting role 63%

According to men, women are more often portrayed by media as...

Leaders 56%	Caretakers 44%
Assertive 61%	Submissive 39%
Strong 67%	Dainty 33%
Accomplished 27%	Sexy/attractive 73%
In a leading role 55%	In a supporting role 45%

Media Microcosm: The State of Representation in Sports

Representation in sports is not a level playing field.

There’s a wide gap between the perceived importance of women’s representation in sports and where consumers feel that representation currently stands. While most consumers (83%) believe that better representation of women in professional sports will further women’s equality, less than one-third say that female athletes are usually given the recognition they deserve (Figure 9). What’s more, only about a quarter feel that female athletes are currently as respected as male athletes (Figure 9).

A large part of the problem may stem from media coverage. Only half of respondents feel that female athletes are given the same amount of airtime as male athletes. And when that airtime is given, just 36% say the media represents female athletes “very positively” (Figure 10).

Reflecting this, consumers say the top three barriers that exist for women in the industry are: #1 a lack of willingness to support women, #2 lower interest in women’s accomplishments and #3 the pay gap. The perceived lack of interest in women’s sports often creates a vicious cycle, feeding a lack of airtime and lower pay and vice versa.

The reality of representation is even starker than most American’s realize – according to SeeHer women make up 44% of all athletes, yet only receive 4% of sports media coverage³.

The lack of positive media representation directly impacts the future of women and girls. Research by the Women’s Sports Foundation has uncovered that it is a significant reason why high school and college girls drop out of sports at 2x the rate of boys⁴. Unfortunately, many people underestimate how much this sets girls back. Girls and women who play sports benefit from increased self-esteem, a more positive body image and greater confidence.

Figure 9

American's Attitudes About Women's Equality In Sports

% that agree with each statement

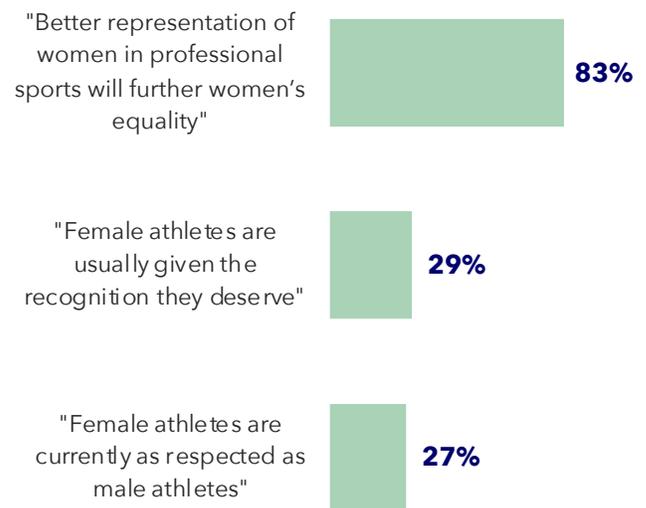
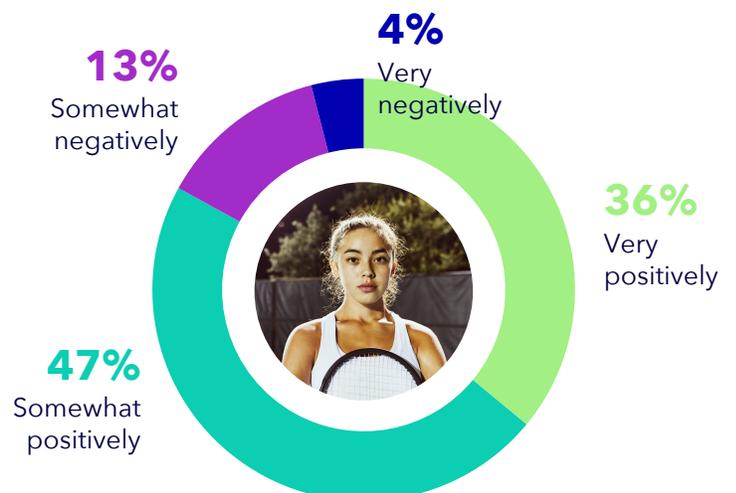


Figure 10

How Media Represents Women In Sports



³ Tucker Center for Research on Women and Girls in Sports

⁴ Women’s Sports Foundation

Media Microcosm:

The State of Representation in Music

Consumers perceive better representation in the music industry, but there is still work to be done.

As in professional sports, Americans feel that the better representation of women in music will further women's equality overall (87%) (Figure 11).

While many Americans acknowledge that female athletes are often not given adequate airtime, a majority of consumers perceive the airtime given to male and female artists in the music industry as equal: 75% of respondents say as such.

Despite perceiving female artists as receiving equal airtime, consumers say the industry continues to have an issue with respecting women. Only 36% of consumers say female artists are usually given the recognition they deserve and just 41% of consumers say that women are typically as respected as men in the industry (Figure 11).

Furthermore, consumers feel the number one existing barrier for women in music is sexualization/ harassment (different expectations for women vs. men and lower interest in women's accomplishments round out the top three).

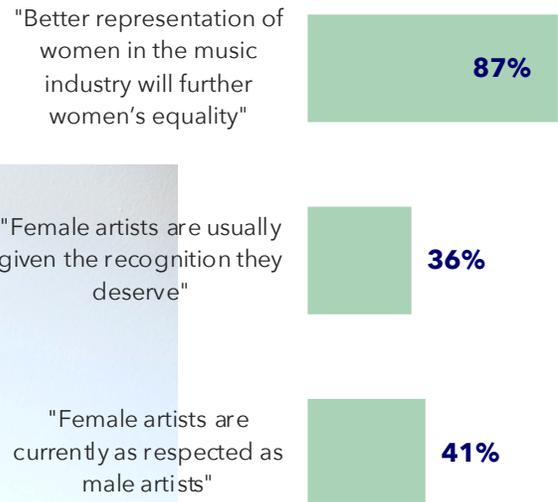
To bring inclusion to the stage and the recording studio, the music industry needs to rethink they way they think about women, seeing their worth and creativity rather than exploiting their looks.



Figure 11

American's Attitudes About Women's Equality In Music

% that agree with each statement



Strategies For Change:

Potential of Media to Impact Gender Equality vs. Current Representation

Confront stereotypes head-on by committing to change them. With the proliferation of media platforms including, digital, streaming, movies, television and radio, there are now multiple touchpoints where consumers are exposed to images and stereotypes that can influence their self-worth, the careers they choose and even society's acceptance of individuals in certain roles. Media executives can no longer simply acknowledge the problem of representation but must move to fix it by portraying women in more diverse and powerful roles across all media touchpoints.

Champion female accomplishments (in Sports & Music, particularly) through media coverage.

Media coverage showcasing how women overcame challenges and setbacks in male-dominated industries can show young women they deserve as much of a platform as men have. Female voices can raise awareness of the challenges women face and break down the barriers that stand in girls' way. Sports & music brands can take the lead as well by ensuring equal gender representation in advertising and across owned channels.

Engage in Gender Equality Measurement for ads and programming.

SeeHer's GEM® Score is the global industry standard for identifying gender bias in ads and programming. With 4 years of trending and over 140K ads tested, GEM® is a proven methodology that has helped leading marketers to rethink their ads from a gender bias standpoint. With their role as arbiters of mainstream representation, marketers and media companies should actively use all available resources to ensure they are accurately reflecting society.



Disconnect 04

What brands deliver vs. what consumers want in terms of gender equality

The involvement of brands and companies - as both marketers and employers - is seen as crucial to further progress. While almost half of respondents say brands have a lot of responsibility to improve women's equality (45%), fewer believe businesses have made significant progress in the last decade (just 39%). This disconnect is especially interesting when considered alongside additional research conducted by dentsu, which found that 72% of consumers say brands have a responsibility to drive social change⁵.

Tying back to the importance consumers place on fair media representation, more accurately representing women in advertising is one of the top actions they want to see brands take to advance the stature of women (Figure 12).

Brands can best meet consumers expectations by creating ads that show women in positions of leadership and in situations that reflect 'real life' (Figure 13).

There is a need for brands to act against gender inequality to fulfill consumer expectations. Those that fail to do so risk being left behind by those they wish to reach.

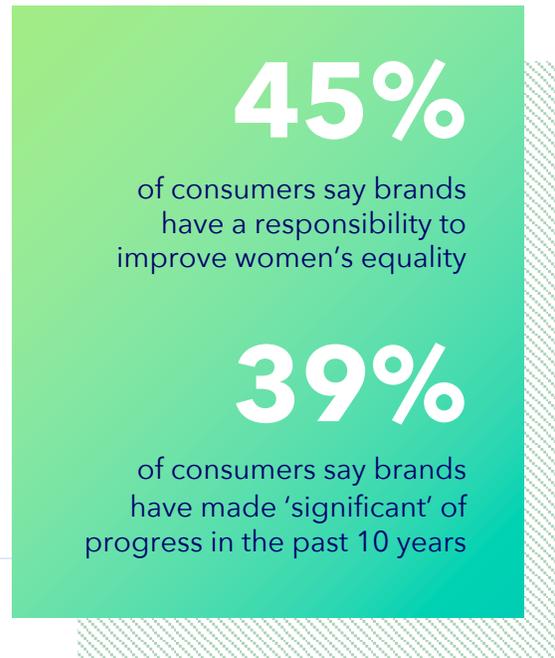
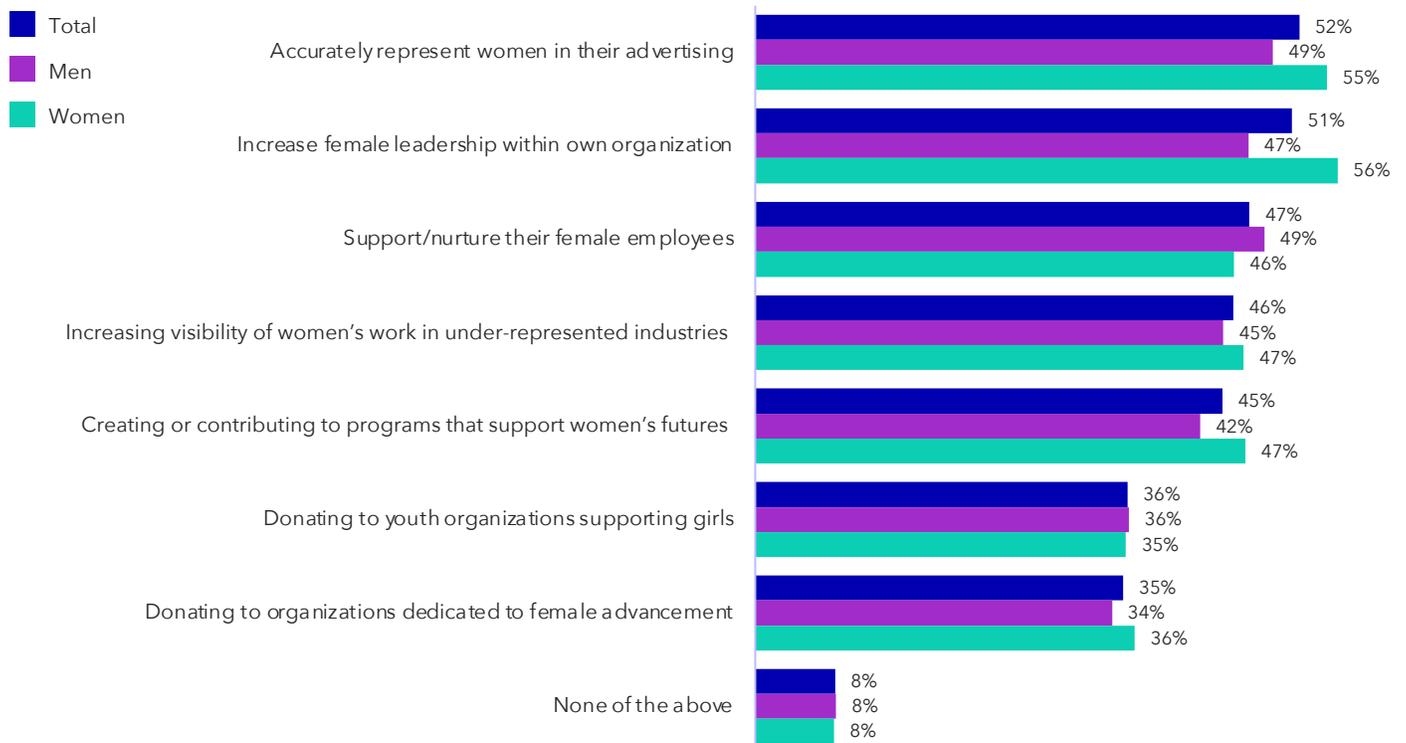


Figure 12

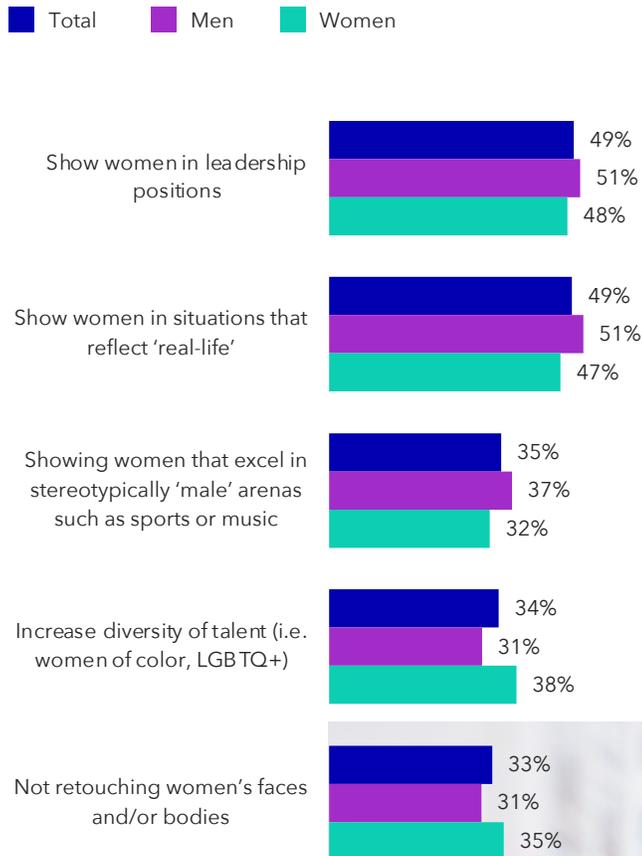
Initiatives Consumers Most Want To See From Brands To Advance The Stature Of Women & Women's Equality



⁵ Dentsu COVID-19 Recovery Navigator, consumer survey, June 2020

Figure 13

Improving Representation In Advertising



Consumers also want to see more women represented in the boardroom.

51% say that brands increasing female leadership within their organization is the most impactful way to improve women's equality (Figure 12). Indeed, in 2019 only 7.4% of the Fortune 500 companies were led by female CEOs, the highest figure in the list's history⁶. Closing the leadership gap as well as encouraging women to join historically male dominated occupations is important to addressing other issues such as pay inequality.

Women feel strongly about the power of representation, both in advertising and in boardrooms.

Both genders equally believe that brands have 'a lot' of responsibility to improve women's equality (45%, respectively). However, there are differences between how men and women say brands can take action.

Women especially want to see brands commit to increasing female leadership within their own organizations as well as to better represent women in ads (Figure 12). Within ads, women want to see more women represented in leadership positions and in 'real-life' situations (Figure 13). They are more likely than men to want to see ads reflect increased diversity and for brands to commit to stop retouching.

In an encouraging sign, men want to see more realistic portrayals of women in advertising as well. In fact, 51% want to see women shown in leadership positions and in more 'real-life' situations, respectively. Additionally, men appear to feel more strongly about women's representation in stereotypically 'male' arenas than women (37% vs. 32%, respectively)(Figure 13).



⁶ Fortune, "Women run 37 Fortune 500 companies, a record high" May 2020



Strategies For Change: What Brands Deliver vs. Consumer Expectations

Brands must reflect the modern woman.

A majority of consumers reject what they perceive as outdated ideas of gender roles. Marketers should ensure they are painting a progressive portrait of women - highlighting their intelligence, strength, leadership and athleticism. These should also keep in mind that portrayals of women and girls include accurate representation of race and ethnicity, body type, gender, ability, sexual orientation and age. Concurrently, brands need to help redefine and move beyond stereotypes of what it means to "be a man."

Marketers should ensure external action matches internal action.

Consumers not only want brands to champion women on screen, but to champion women within their own organizations. Brands are also employers and need to foster a progressive work environment through the equal representation of women as employees and leaders, equal pay for equal work and bias training. Modern consumers will be quick to call out brands whose values do not reflect their advertising messages.

The tide has turned in terms of consumers only viewing brands as providers of products or services.

Consumers are now very mindful of the role brands play in the larger societal ecosystem and brand reputation is increasingly becoming tied to their actions and behavior regarding social issues. To stay relevant and maintain 'brand love', marketers should ensure that they are meeting consumers' needs and expectations around concerns like gender equality.

Conclusion

An overwhelming majority of Americans believe that gender inequality is an important issue in the US. However, the results of our research suggest that women and men feel differently about progress, the pervasiveness of the issue and what should be done about it. It appears that men tend to be overly optimistic about progress made, in turn making them less attuned to the persisting inequalities that women face. These findings are worrisome because people's concern with inequality ultimately predicts their willingness to address it. It is crucial to bridge that disconnect to maintain a sense of urgency around women's equality and keep us moving forward, together, to create and accelerate change.

As human beings, our perceptions often become our reality. We actualize the things we perceive to be true. To us, there is a clear connection between how media and advertising shapes society's perceptions of women and the attitudes Americans express about women's equality. The continued objectification of women is a persisting issue both in women's experiences with harassment and in media representations that reduce them to their physical appearance. Another theme is the underrepresentation of women in positions of leadership, both literally in the boardroom and figuratively on screen.

There is also a connection between media and brands and the ability to maintain or remove barriers to women's equality. The majority of consumers feel that brands have a responsibility in driving social change. They also fully recognize media's role in shaping gender norms and showing children that girls are equal to boys. This is indeed a very significant power and it comes with significant responsibility. Marketers and media have been given a mandate from consumers to be part of the solution. It is up to them to leverage tools like this research and SeeHer resources to improve female representation and in turn, change society's perceptions.

The implications of the research feel especially poignant in light of Ruth Bader Ginsberg's recent passing. A mother, leader and champion of women's rights, Ginsburg spent a lifetime flourishing in the face of adversity. In tribute to her powerful spirit, gender equality and inclusive storytelling in media has never been more important.



Perceptions of Progress, a three-part series:

Perceptions of Progress: The State of Women's Equality in the US is a series of three reports. While this edition provides an overview of the study findings overall and differences in perceptions by gender, the next report will focus in-depth on the compounding issues of intersectionality for women of color. The third report will focus on how generational cohorts perceive women's equality and representation (release schedule TBD).

Sneak Peek

Part II: Understanding the perceptions of women of color

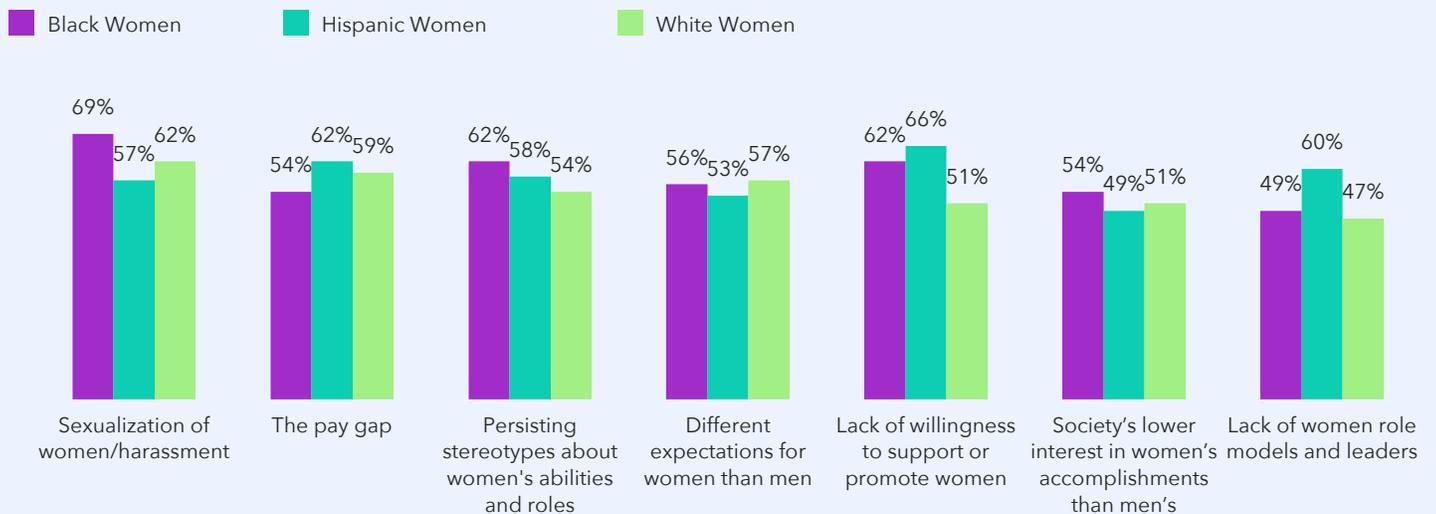
The unfortunate reality is that many of the barriers covered in this report are only compounded for women of color. It is crucial to understand how their perceptions and experiences differ in order to achieve equality for all women.

Overall, both Black and Hispanic women are more likely than white women to say that they face a variety

of barriers to equality. In particular, Black women feel that sexualization/harassment, persisting stereotypes and a lack of willingness to support women are key barriers. Hispanic women are also more likely to feel there is a lack of support, as well as that the pay gap and a lack of female role models and leaders contributes significantly to the inequality they face.

Figure 1

Existing Barriers To Equality For Women in the US



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We would also like to thank Getty Images for providing the photography used in this report as part of their ongoing partnership with SeeHer.

Additional Resources for Marketers

SeeHer and Getty have teamed up to create an *Inclusive Visual Storytelling Guide* to change the way women are featured in the media. The guide highlights inclusive imagery from Getty's vast library as well as offers tips to consider when developing projects.

<http://engage.gettyimages.com/see-her>

SEEHER ANA

| dentsu

As part of dentsu's steadfast commitment to champion meaningful progress, earlier this year, the company joined SeeHer as the first advertising holding company to become a member at the enterprise-level. Both dentsu and SeeHer are keenly aware of the power of concrete data and actionable insights to impact and inspire lasting change, and this report is the first output of our partnership.

