

2021 GEM® LIFT STUDY

Accurate Portrayal of Women and Girls Accelerates Business Growth Across Gender, Language, Race and Ethnicity



Executive Summary

If the world economy had a gender, it would be female.

Globally, women control \$31.5 trillion in consumer spending, \$10 trillion in the U.S. alone. In addition, women globally drive close to 90% of consumer goods purchasing through a combination of buying power and influence. As caregivers, Chief Household Officers and supporters of extended family and friends, women also have a significant multiplier effect on purchase decisions.

Given this, it's not surprising that women want to see themselves authentically portrayed in advertising and media. But despite the power of the female purse, 70% of women don't feel fully presented in media.¹

Women represent more than half the population, yet they are depicted in fewer than 38% of the lead characters on TV shows, according to the 2021 UCLA Hollywood Diversity report. Likewise, people of color represent nearly 40% of the U.S. population, but make up less than 25% of screen time.² Drilling into advertising, 62% of Asian Americans and 41% of Hispanic Americans report they rarely, if ever, see themselves represented in ad content. Nearly a third – 32% – of Black Americans said the same, according to research from Morning Consult.

In addition, throughout the past two years, the U.S. has experienced a social reckoning, grappling with inequality during a pandemic. Brands, retailers and media now have a responsibility and opportunity to more deeply connect with diverse consumers by recognizing them and reflecting them in their messaging. This is mission critical, as now more than ever, consumers are voting with their dollars.

In this report, an update of the "Accurate Portrayals of Women and Girls in Media: Proven to be Good for Business" report, the Association of National Advertisers' (ANA) SeeHer movement and IRI look at the progress made and the work yet to be done to ensure diverse voices and images are recognized and reflected in brand, corporate and media messages.



1. Perceptions of Progress, The State of Women's Equality in the U.S., SeeHer & dentsu, 2020 2. eMarketer

Building on a Strong Foundation

To address these imbalances, in 2016 the ANA, in partnership with The Female Quotient (The FQ), launched SeeHer, a movement to accurately portray women and girls in marketing, advertising, media and entertainment, so they see themselves as they truly are and in all their potential.

To measure progress of this important mission, SeeHer spearheaded the development of GEM® (Gender Equality Measure) to uncover unconscious gender bias in advertising and programming. This measurement has been widely recognized by the industry and received ESOMAR's highest honor for advertising effectiveness. GEM is considered the global "gold standard" for gender equality measurement. With this data-driven, open-source methodology, over 200,000 ads have been GEM tested by research partner ABX. The methodology is used in numerous global markets that equate to 87% of worldwide advertising spend. In addition, as it is open sourced, many marketers and media companies leverage the GEM methodology to test ads and content in-house as part of their gender equality process.

GEM evaluates consumer reaction to four key statements regarding the accurate portrayal of women and girls in ads and programming. Expressed as an index, a GEM score of 100 is on par with the baseline for all tested ads, and all scores above 100 are considered high GEM scores. In 2018, SeeHer took this measurement a step further and partnered with IRI, a global technology, analytics and data company, to conduct attribution analysis to understand the intersection of high GEM-scoring ad campaigns and programming to actual sales lift and return on ad spend to uncover the business imperatives associated with supporting accurate portrayals of women and girls in ad campaigns. In short, do accurate portrayals of women in advertising boost sales?

Starting with a single brand and then extending to multibrand analyses, SeeHer's GEM Lift studies, powered by IRI Lift[™], looked to substantiate the link between sales and accurate portrayals of women. The results were conclusive: **Ads with the highest GEM scores had the highest sales lift.**

In fact, our 2020 study found that campaign creative that accurately portrays women and girls can garner *five times* incremental sales lift and *two times* sales lift when placed in proper programing.

With our 2021 study, the results are even more impactful. Viewed from an intersectional lens, the study revealed that across gender, language, race and ethnicity, ads with high GEM scores overall delivered 60% improved sales performance.

Clearly, doing good is an essential accelerant for business growth.

Across gender, language, race and ethnicity, ads with high GEM scores overall delivered 60% improved sales performance.

Importance of Gender Equality

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

Despite this optimism about the future, 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. This indicates that even with strong progress, 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 regard to economic opportunity and financial parity) in the U.S.

A key strategy to impacting this economic inequality starts with intentional change in our images, messages and narratives. Americans see media as uniquely positioned to positively impact gender equality through the better representation of women. More than half (52%) of consumers say media has **a lot of responsibility** to improve equality and 72% believe that brands can drive social change. In fact, the majority of consumers feel that media's role is truly fundamental; 81% of consumers feel that "media is crucial in shaping gender roles," while 84% state that "media has the power to teach children that "girls can do anything that boys can do."

Given the importance awarded to media and marketing in our society, understanding the through-line between the accurate portrayal of women and girls to direct business growth can be game-changing.

It is for these reasons that SeeHer is committed to not just improving the authentic depiction of women and girls, but also continuing to quantify through research what this means in terms of the essential business priority of creating growth.

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1. Perceptions of Progress, The State of Women's Equality in the U.S., SeeHer & dentsu, 2020

Consumers Raise the Bar on Accurate Portrayals of Women and Girls

It's critical to note that women's equality is an important personal issue among a majority of Americans, with 73% of both men and women in agreement. In fact, over the last four years there has been a 21% increase in consumers being *aware of and concerned* about gender bias in ads and content.

Consumers also report a 16% increase in seeing women portrayed as role models. This is coupled with a 22% increase in seeing women depicted as successful professionals and a 54% increase showing them in STEM careers.

For the same time period, when looking across GEM-tested ads, we have seen an increase in female representation. In addition, perceptions of what is "appropriate" in female portrayals has shifted 15% as consumers become more discerning and demand to see more accurate portrayals of women, and most telling is that there has been a double-digit decline in the most objectionable ads.¹ 65% female representation in ads, a 21% increase
15% increase in appropriate scores
42% decrease in most objectionable ads

Source: ABX

The standard for female representation and portrayal has increased and consumers are now demanding a more authentic depiction of women in advertising than in previous years.

All these are signs of progress, and this same "raising of the bar" has been seen in our GEM Lift studies.



1. ABX/Advertising Benchmark Index, 2017-2020

Changing Consumer Expectations

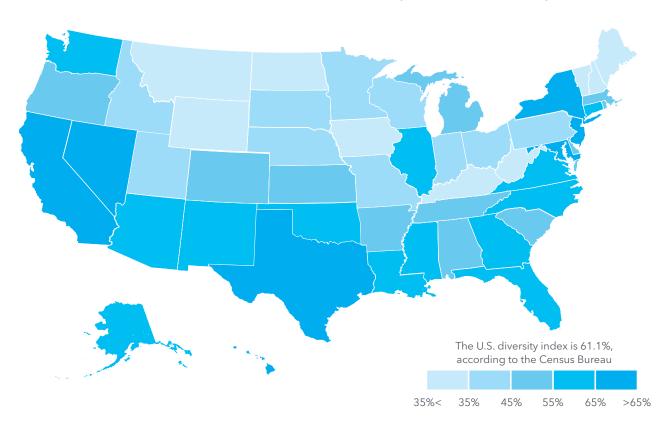
In 2020, SeeHer and IRI set out to confirm the bottomline benefit of attributing proper and appropriate messaging and programming to women and girls to actual incremental sales results. Analyses depended on a diverse group of advertisers and programming from companies and brands across multiple categories and with varying levels of gender-centricity. The following SeeHer members leaned in to participate in the study: Anheuser-Busch InBev, Clorox, Hershey's, Kellogg's, Keurig Dr Pepper and L'Oréal Paris. The results were conclusive: Ads with the highest sales lift had the highest GEM scores. Ads with the lowest sales lift had the lowest GEM scores. Creative with GEM scores greater than 100 drove sales lift up to five times compared to ads with scores less than 100. Similarly, with television programs, those with GEM scores greater than 100 drove lift of nearly two times compared to programs with GEM scores of less than 100. Further, there were synergistic effects, as high GEM scores greater than 100 had up to 93% greater lift than those placed in programs with less than 100 on the GEM score index.



An Intersectional Lens

As we looked to update the GEM Lift study from Q3 2020, the world had profoundly changed. We were deep in the midst of a pandemic and a racial reckoning in the U.S. It was imperative at this juncture to address the reality of the U.S. being more diverse than ever.

As a nation, we're more diverse than ever and that needs to be represented in all cultural aspects.



Sales lift is incumbent upon recognizing and addressing the diversity of the American population, and this essential fact needed to be incorporated into our attribution analysis. In fact, in the U.S., people of color hold a growing share of buying power in the American economy. The Black population's share of buying power increased nearly 50% from 2010 to 2019; and during the same period, Hispanics' share increased nearly 70%. Further, across all races, 83% of all consumption in the U.S. is directed and influenced by women.

	Share of U.S. Population	Buying Power	Share of Buying Power	% Increase 2010-2019
Black	13.4%	\$1.4T	8.9%	48.1%
Hispanic	18.6%	\$1.7T	10.7%	69.1%

Source: Catalyst.org

In addition, multicultural audiences also drive media consumption.

Americans overall spend an average of just more than 22 hours/week watching TV, per Statista, with smartphone users spending an additional 28 hours a week on the internet, per eMarketer.

African Americans:



30+ hours/week watching TV

222 hours/week watching videos/using apps on smartphones

However, media investment still lags the impact of multicultural audiences. Specific to Hispanic metrics, only 6% of advertising industry investment is directed at the Hispanic community, per the Hispanic Marketing Council. And the USC Annenberg Inclusion initiative found that despite accounting for 25% of box office tickets sold, just 7% of leading roles were filled by Hispanic/Latinx actors in 2019. And here's a wakeup: Edelman's 2021 Trust Barometer found that 54% of Hispanics feel they can better influence social issues through the brands they buy than who they vote for.¹

We see similar trends with media investment targeted toward the Black population. According to the Selig Center for Economic Growth and MAGNA, Black buying power is on pace to reach \$1.8 trillion by 2024. AdExchanger reports that Black consumers are 58% more likely to expect the brands they buy to take a stance on issues that matter to them, and 37% are more likely to buy a brand when they do. Yet, Black-focused ad spend in 2020 remained below 2% of total spend, despite Black consumers being 13%+ of the market.

Given these realities, we revisited the GEM Lift study to delve deeper into sales lift from the lens of gender, race and ethnicity, and language.



1. eMarketer

Accurate Portrayals Are Raising the Bar of Representation

With the dedicated support of SeeHer members PepsiCo, Johnson & Johnson, L'Oréal, General Mills and Kimberly-Clark, our 2021 study measured 29 creatives, six brands and 837 aired programs across a myriad of platforms.

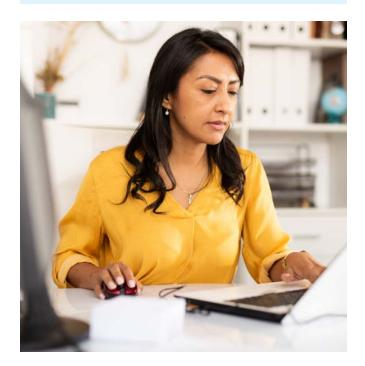
We found that while in 2019 a GEM score of 100 or greater drove sales lift, in 2021 the baseline had to be increased to 106 to see incremental lift. This change reflects a raising of the bar in terms of representation across media of diverse women, indicating the movement to more accurately portray women and girls is moving the needle. SeeHer has been actively leaning in, increasing GEM testing of ads, expanding best practices workshops and task forces to help advertisers embed gender equality into the media buying and planning landscape.

We know, it's challenging to get consumers' attention and even more difficult to build a loyal relationship with them. And according to our latest study, getting to the original baseline of 100 is now table stakes for success. Achieving the new baseline of 106 translates to more meaningful growth for marketers. It means tapping into the higher consumer expectations and being rewarded when diversity and diverse women are represented. All consumers, including men, want to see their mothers, sisters, daughters, friends and female partners accurately represented. If brands and media want to continue to see incremental growth, they need to more deeply embed GEM best practices in advertising and programming.

Simply put, accurate representation is good for brands and for society.

106

Achieving a baseline GEM score of 106 indicates that consumer expectations for representation are being met.



the movement to more accurately portray women and girls is moving the needle

Sales Lift Among Women of Color

Creatives that meet or exceed the new GEM baseline of 106 are able to increase sales lift overall by 60%,

AND

41% among Hispanic women

Ads with high GEM scores overall delivered **60% improved sales performance**. High GEM-scoring shows generated a higher household dollar sales lift, compared to programming with medium-representation and far outpacing programming with low GEM scores.

Hispanic Women

When looking specifically at Hispanic women, ads that meet or exceed the new GEM baseline of 106 are able to **increase sales lift by 41%** vs. ads that scored below 106.

Number of Spanish ads: 6 (2 Yoplait, 4 L'Oréal), 17.6% sales lift

Comparing the impact of high GEM Spanish ads vs. average lifts of all ads against Hispanic women: 139% increase in sales lift

Note that Spanish ads only aired on Spanish networks. Combining these ads, most of which had GEM scores greater than 107, generated a lift of 17.6%, indicating that the positive representation of Hispanic women in Hispanic-specific campaigns drives incremental value for the brand. Among Hispanic households, these Hispanicspecific campaigns drove lifts in sales 139% greater than non-Hispanic-specific campaigns.

This lift in sales – based on accurate, realistic representation – is critical to business growth as there

80% among Black women.

are **31 million Hispanic women in the U.S. and they represent one in five women overall.** In addition, for brands looking to create long-term brand loyalty, 57% of Hispanic women are aged 34 or younger, meaning they'll be active consumers for years to come.¹

Equally important is that Hispanic women invite brands to act as advocates and partners for gender equality and are actively looking for role models. Compared to white and Black women, Hispanic women are more likely to feel initiatives from media and brands can improve gender equality.²

In particular, they expect these entities to play key roles in breaking down barriers. On the media side, a notable barrier is a lack of female role models (60%). From brands, it is a need for a diversity of talent in ads. As shown by the documented increase in sales in the latest GEM Lift study, when brands get portrayal right, the growth potential is significant.

Using personal beauty brand L'Oréal creative as an example of Hispanic representation, all creative with GEM scores higher than 106 saw a 12% sales lift; even creative with scores under 105 showed lift of 7%.

TV shows with GEM scores between 110-119 (115 average) and a creative score of 111 was the sweet spot, resulting in a 16% sales lift for L'Oréal. Networks with the highest lift included VH1, Telemundo, Fox, TNT and TLC, all ranging in lift between 12.5% and 19%. Consumers here showed a preference for lifestyle, music and Spanish-language programming.

Source: U.S. Census Bureau, Current Population Survey, Annual Social and Economic Supplement, 2019
 Perceptions of Progress, The State of Women's Equality in the U.S., SeeHer & dentsu, 2020

Black Women

While research has shown that all women believe that progress still needs to be made for representation to reflect reality, for Black women in particular there is significant work to be done to more truthfully tell their stories. This signals an opportunity for marketers and media to create more positive, empowering and realistic narratives that truly reflect Black women.

In fact, Black women are least satisfied with media representation – only 18% of Black women feel media accurately portrays women "all of the time," compared to 31% of Hispanic women and 25% of white women.¹ Black women want media and brands to go beyond stereotypical stories of Black women to deliver more empowering, intersectional and multidimensional portrayals of the realities of their lives.

In addition, Black women are most likely to want brands to show women in "real-life" situations (51%), indicating that they currently feel that ads do not reflect their reality. This leads to the question: When advertising truly reflects the lived experiences of Black women, is there a business impact?

We found that the impact is remarkable. When looking at the same comparison of ads that meet the new GEM baseline of 106 or greater vs. those below, we see an increase in sales of 80% among Black women. Again, using L'Oréal creative as an example, we saw lift of 7% among higher (106 and higher) GEM-scored creative and even a lift of 4% for lower (100-105) GEMscored creative.

These findings clearly underline the critical need to create nuanced and respectful portrayals of Black women.



1. Perceptions of Progress, The State of Women's Equality in the U.S., SeeHer & dentsu, 2020

Men as Allies

Across research conducted by SeeHer over the past year, a consistent finding that has emerged is the allyship of men in terms of women's equality. We found that women's equality is an equally important issue for men as well as women, with 73% citing it "personally important."¹

A corollary to this finding, from a study focusing on the importance of brand narratives during times of crisis, found that fatherhood seems to make an even bigger difference in terms of the focus on women's equality than motherhood does for women. In fact, 47% of fathers, compared to 38% of all men and 44% of mothers, believe that the media has "a lot" of responsibility in addressing gender inequality.² This sense of allyship is borne out by the GEM Lift study when viewed by gender. When looking at ads that score at 106 or above vs. those scoring below that mark, we find a 12% incremental sales lift for women, but an 81% lift for men. Even accounting for the larger share of spending generated by women, these are noteworthy lifts among men.

This pattern also plays out among men of color. We see a 120% lift among Hispanic men and a 196% lift among Black men when comparing ads with GEM scores of 106 vs. lower scores.



1. Perceptions of Progress, The State of Women's Equality in the U.S., SeeHer & dentsu, 2020 2. eMarketer

Case Studies

"No" Can Be Beautiful

PepsiCo Partners' Pure Leaf iced teas gained cultural traction for illustrating the positive power of "no" in supporting mental health. The "No Is Beautiful" campaign aligns with Pure Leaf's "no" process for brewing iced tea: No artificial flavors, no tea powders or concentrate. The campaign encourages consumers to say "no" to things that do not matter so they are able to say "yes" to more things that do matter. Research conducted by Pure Leaf found that 85% of women agree that taking on too many tasks negatively affects their quality of life, and 86% agree that being able to say no to more undesired asks would feel liberating.



The theme of this campaign dovetails with research conducted by SeeHer & GWI, which revealed that messages of self-care and support are narratives women desire. The sales lift documented in the GEM Lift study served to further bolster these findings. The Pure Leaf campaign saw significant increases in sales among all women measured.

Success – and further proof that accurate representation across gender, race/ethnicity improves sales performance – was seen across a number of CPG brands researched, including:

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With **Pure Leaf** iced tea's GEM score of 111, the brand saw **119% sales lift** compared to its lowest scored ad of 100 among all diverse women groups.



When **L'Oréal Paris** personal and beauty brands **Nutrisse** and **Fructis** ran ads across TV shows with GEM scores of 97-114, there was a **12%** average sales lift among higher Hispanic GEM score creative.

Kimberly-Clark brands Depend and Poise saw a 4% increase in sales among all diverse women groups between high and low GEM ads. (

General Mills' Yoplait brand experienced a more than **6% sales lift** on its strongest performing network.

For **Johnson & Johnson's Zyrtec** brand's highest GEM-scoring (112) ad, the core driver of the lift in sales is an **increase in household penetration**, showing the campaign is driving new buyers and existing buyers to purchase the product at a higher rate than those who were not exposed to the campaign.

Summary

Our study findings show that marketing that accurately reflects societal shifts is what will propel business growth. To that end, understanding evolving consumer needs and expectations and correlating that to bottomline business growth is a critical component of the ongoing SeeHer and IRI GEM Lift research.

The involvement of brands and companies in this research is crucial to further progress. 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.

It's clear that consumers believe that media and brands play a powerful role in how women and girls see themselves and in shaping how society views them; the most powerful way to address consumers' expectations is by creating ads and content that show women in positions of leadership and in situations that reflect real life. In a larger sense, this connects back to one of the key trends to emerge from the pandemic. Consumers increasingly want to engage with brands that align with their values and show a clear commitment to diversity, inclusion and community. In fact, half of consumers report that when brands/companies show support to people during times of crisis, it impacts their purchasing decisions (women: 45%; men: 50%).¹

We know the images and stories we see reflected back at us will always be important because they shape how we see ourselves. Creating more impactful, representative, and ultimately inspiring media directly supports women and makes the gap to equality that much narrower. And just as important, it is the fuel that drives business growth.



1. The Fragile (im)Balance; How Brand & Media Narratives Support Women in Times of Crisis

Appendix

Marrying GEM[®] to IRI Lift[™] Created a Unique Solution, GEM[®] Lift

Powered by IRI Lift[™], the GEM[®] Lift methodology gauges the equality of ads, provides campaign reads for TV and layers these inputs with shopper and sales data, including more than 500 million frequent shopper loyalty cards from multiple national retailers, as well as IRI's own consumer panel and point-of-sale data for all outlets.

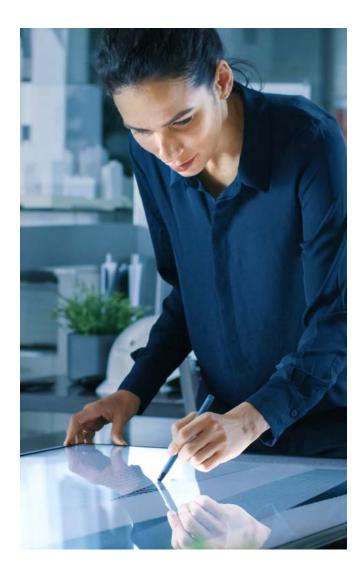
GEM[®] Lift examines the correlation of ad exposure to offline sales. IRI combines frequent shopper, panel and store sales data with macroeconomic factors and TV advertising viewership data, and then tracks exposure to the advertising, and converts those exposures back to a household to tie together exposure and in-store purchase data to measure impact.

In addition to the GEM[®] metrics of "presented, respectful, inappropriate and role model," referenced in the questions listed below, GEM[®] Lift rates campaigns on overall incremental sales and identifies key performance metrics such as occasions, dollars per occasion and penetration. Additionally, it breaks down key shopper metrics like share of requirements, fair share, buyer flow, and trial and repeat to provide a robust understanding of campaign performance. With GEM[®] Lift, advertisers can answer and respond to critical questions, including:

- What is the overall incremental sales impact or lift of the GEM[®]-scored ad campaign?
- What publishers/networks provide the highest sales impact?
- Which creative message, publishers and placement strategy should I be adjusting to optimize impact?
- Which target audience best responds to cross tactics like programming and creative?
- What combination of programming and creative worked best?

The GEM® methodology is based on a four-statement module:

- How the female characters are being presented.
- If characters are shown in a respectful manner.
- If characters are presented in an inappropriate manner.
- If characters are viewed as a positive role model.



GEM Lift Methodology

As applied to GEM*, IRI Lift is a rigorous media measurement and optimization solution that uses sales outcomes as the core metric for both measurement and optimization at a household level. The IRI Lift methodology produces performance metrics across multiple sub-campaign dimensions and key performance indicators. The solution is powered by a combination of expansive assets, including:

- A loyalty card dataset composed of more than 500 million loyalty cards; 117 million unique households covering 93% of the U.S.; spanning national major retailers from grocery, drug, club and convenience channels.
- Billions of impression-level ad exposures for TV, powered by LG Ads Solutions, a convergent TV solutions company.
- IRI's national consumer panel, which captures all outlet household-level purchases.
- And 20 different causal variables, including weather; macroeconomic variables such as gas prices; and store variables, such as promoted price, displays and merchandising measures.

IRI Lift connects the people exposed to the media with the products they buy in store. In this GEM® Lift study, TV viewership provider LG Ads Solutions incorporated a panel of 34 million households, which enabled IRI to connect households and devices. IRI supplied offline transaction data from loyalty cards, and then used defined-test households paired up against exact look-alike households as the control for the measurement universe. IRI further ingests time-stamped exposure files and overlays them with time-stamped purchase behavior for modeling. Because all channels don't utilize loyalty data to the same degree, IRI enables adjustments for channel over- or under-penetration to factor higher sales rates in a given channel and incorporates causal variables to ensure balanced national projections. This stringency results in accurate accounting and control against these extraneous factors to truly understand advertising impact.

IRI runs separate models on KPIs to understand how a campaign performed and if it's driving lift, including penetration, occasions or dollars per occasion. Massive scale of data generates granular results at the sub-campaign level, analyzing TV performance at the creative, network, daypart and duration levels with cross-performance metrics, such as by advertising creative and network program.



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About IRI

IRI is a leading provider of big data, predictive analytics and forward-looking insights that help CPG, OTC health care organizations, retailers and media companies to grow their businesses. With the largest repository of purchase, media, social, causal and loyalty data, all integrated on an on-demand, cloud-based technology platform, IRI helps to guide its more than 5,000 clients around the world in their quests to

remain relentlessly relevant, capture market share, connect with consumers and deliver market-leading growth. A confluence of major external events – a revolution in consumer buying, big data coming into its own, advanced analytics and automated consumer activation – is leading to a seismic shift in drivers of success in all industries. Ensure your business can leverage data at www.iriworldwide.com.

Corporate Headquarters: 203 N. LaSalle St., Suite 1500, Chicago, IL 60661, USA, (312) 726-1221

SEE**HER**

About SeeHer: Despite strides made in recent years to accurately portray women and girls in media, unconscious bias persists throughout advertising and entertainment. The average age, race, body type, and other aspects of women depicted in media today still represent only a small fraction of the female population.

SeeHer is a collective of marketers, media organizations and industry influencers committed to creating advertising and supporting content that portrays women and girls as they really are. The movement was launched by the Association of National Advertisers (ANA) in partnership with The Female Quotient (The FQ) June 2016 in Washington DC at the United State of Women. To help marketers benchmark success SeeHer spearheaded the development of the Gender Equality Measure[®] (GEM[®]), the first research methodology that quantifies gender bias in ads and programming. GEM[®] shows that content portraying females accurately dramatically increases both purchase intent and brand reputation. In 2017 the GEM[®] methodology won the prestigious ESOMAR Research Effectiveness Award. The methodology quickly became the industry standard, which led to a global rollout in 2018. In 2019, the movement expanded into verticals: sports (SeeHer In Sports) and music (SeeHer Hear Her).

Visit SeeHer.com and follow SeeHer on social media @SeeHer (Instagram, Facebook, LinkedIn) and @SeeHerOfficial (TikTok and Twitter).

LG Ads Solutions About LG Ads Solutions: LG Ads Solutions is a leader in convergent TV and cross-screen advertising, helping brands find hard-to-get unduplicated reach at optimal frequency across the fragmented TV landscape, and to consumers worldwide, with big TV audience data and Video AI designed to connect brands with audiences across all screens and understand resulting business outcomes. Contact LG Ads Solutions at info@lgads.tv.

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