



SEEHER



Strive for More

Optimizing Predictive Creative Drivers to Improve Gender Equality In Advertising.

OCTOBER 2022

SEEHER



Our Mission

Advertisers have come a long way in modernizing the depiction of women. Yet, most people in the U.S. feel that accurate or realistic gender portrayal in advertising is lacking. 57% of men and 59% of women agree that brands still show traditional gender roles that don't reflect reality¹. This is particularly marked among younger consumers with 63% of those under 35 much more likely to think this compared with 53% of those over 50.

In addition, three in four people agree that advertising has the power to shape how people see each other². Therefore, it is our goal to empower brands and marketers to drive positive change by representing women in an authentic and realistic manner in advertising.

To measure progress of this important goal, the SeeHer movement was launched by the Association of National Advertisers (ANA) in partnership with The Female Quotient (The FQ) in 2016. 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. The global, open-source industry measurement has been used to evaluate gender bias in 200,000+ ads, representing 87% of worldwide ad spend³.

In a breakthrough partnership, Ipsos and SeeHer sought to better understand the impact of creative and thematic elements used in ads depicting women by evaluating predictive drivers of gender equality in advertising. This thought leadership collaboration explores how key predictive variables of GEM[®] scores, identified by SeeHer, drive a variety of marketing measures and business growth. For the first time, we also used performance metrics such as Brand Choice Intent and Long-Term Brand Relationship to evaluate the benefits of positive female gender representation on brands. Connecting the GEM[®] drivers' framework to both Choice Intent and Brand Relationship metrics allows us to build a predictive, data driven model that can be leveraged to consistently link the accurate portrayal of women and girls to advertising that improves brand preference.

[1] Ipsos 2021

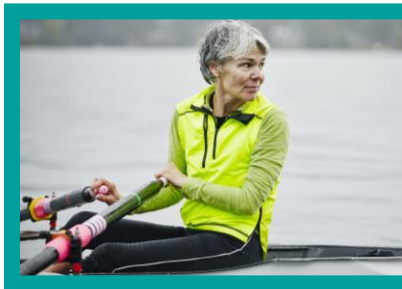
[2] Ipsos 2021

[3] ANA SeeHer I Advertising Benchmark Index, 2017-2021.

KEY FINDINGS

1. REAL LIFE CREATES RELEVANCY

Consumers are ready for more real-life presentations of women and one way to increase the relevance of advertising is to find ways to paint richer, more authentic pictures of women.



2. BIGGER BETS WIN

Portraying women in an appropriate and respectful manner in advertising is very important but increasing consumer expectations now makes this table stakes. Raise the bar to ensure women are presented positively as role models, showing women actively taking control of their lives.

3. BREAKING BIAS CUTS THROUGH CLUTTER

Brands have an opportunity to create change AND differentiate themselves. Portray women in counter stereotypical roles and settings, and within non-traditional categories; gender equal is currently a less cluttered advertising space, with only 50% of all GEM[®] tested ads having above average GEM[®] scores.



4. MULTI-DIMENSIONAL LIVES ARE EFFECTIVE

While women depicted as professionals/working outside the home outperform, both professional and domestic responsibilities have blurred for many women. Find success at the intersection of traditional and modern roles and settings by depicting women with self-agency in all environments.

5. GEM[®] DRIVES SALES AND LOYALTY

Ads that deliver more elevated portrayals of women are significantly more likely to drive choice intent and brand relationship measures, impacting short-term sales and building stronger long-term success for brands.

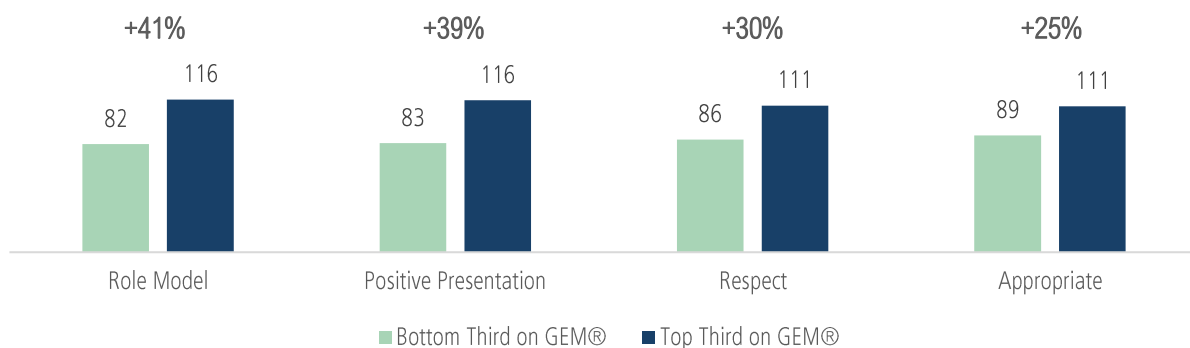


CONSUMERS EXPECT MORE REAL-LIFE PRESENTATIONS OF WOMEN AND ONE WAY TO INCREASE THE RELEVANCE OF ADVERTISING IS TO FIND WAYS TO PAINT RICHER, MORE AUTHENTIC PICTURES OF WOMEN

Women are present in ads, but how they are represented is key. Based on a meta-analysis of the Ipsos database, 88% of ads with people include a woman⁴. Within the smaller subset of ads that have a portrayal of women and a GEM[®] score⁵, 81% of those have the woman/women integral to the story and resulted in a 14% higher GEM[®] score. This data confirms what makes sense to marketers and researchers intuitively, ads where women are the focus tend to depict women in more respectful and authentic roles.

Taking a deeper look at the four pillars that make up GEM[®] helps to explain the drivers for the overall GEM[®] scores. As seen in Figure 1, the relative difference between the ads in the bottom and top thirds of GEM[®] is narrower for Respect and Appropriate, suggesting that consumers are starting to view these two pillars as table stakes. Positive presentation of women and the depiction of them as role models helps brands stand out.

Figure 1: The Four Pillars of GEM[®]



Source: Ipsos GEM[®] Database – 926 ads

In our analysis we found that there were several thematic elements that could be considered predictive drivers for positive portrayal of gender equality.

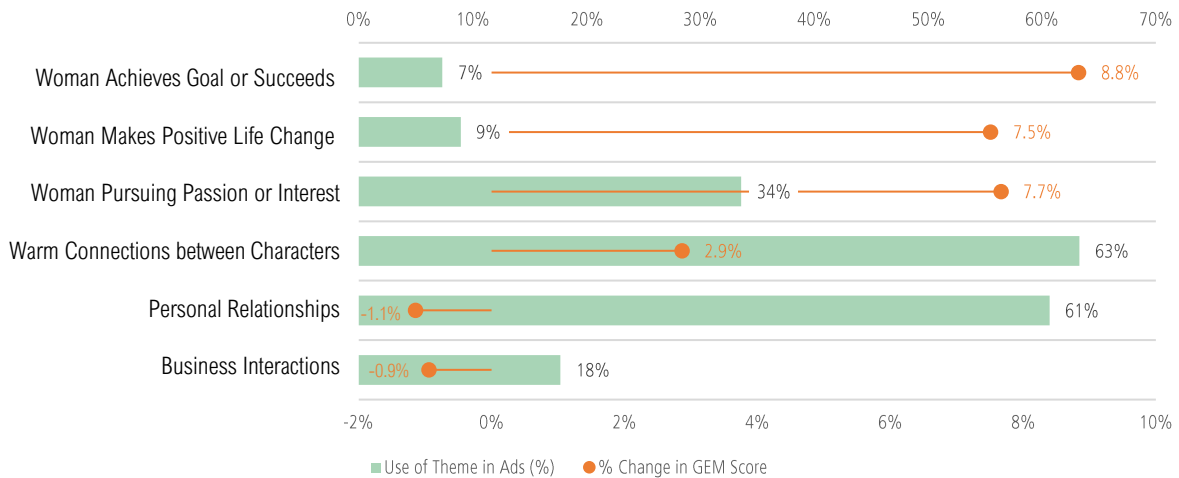
Stories about women being active in their own lives are used less often but are responsible for driving higher GEM[®] scores. Based on our analysis, ads showing women achieving their goals or succeeding are only 7% of ads but they score on average +9% higher. Only 9% of ads portrayed women proactively making positive life changes yet had +7.5% higher GEM[®] scores. Themes of women actively pursuing their passion or interest were reflected in 34% of ads and on average had +8% higher scores. What we found across the board is that ads that take a woman’s participation to the next level not only perform stronger across the four pillars, but specifically give viewers positive role models.



[4] Ipsos Meta-Analysis of 5,153 U.S. ads from 2015-2021
 [5] Ipsos GEM[®] Database – 926 ads

Advertising with more passive themes in their portrayal of women (e.g., warm connections and personal relationships) score within norms. 63% of ads showed warm connections between the characters and those that did scored slightly above norms, +2.9% points higher on average. There are more ads featuring women focusing on personal relationships than business interactions (61% vs. 18%). Yet contrary to popular belief, storylines featuring personal relationships tend to score in line with business interactions, both slightly below average, on the Gender Equality Measures.

Figure 2: Themes in Advertising and their Impact on GEM® Scores



Source: Ipsos GEM® Database – 926 ads

“The GEM® Creative Drivers framework we’ve pioneered with Ipsos provides the why behind GEM® scores by uncovering how thematic elements used in ads drive a variety of marketing and business goals. This predictive model is designed to move the mission of accurate portrayal of women and girls with greater urgency. Now marketers have a blueprint of success in the creative development process.”

-Latha Sarathy
Chief Research Officer, ANA, SeeHer



While women depicted as professionals outperform, brands can still be successful within the confines of traditional settings and roles. After the middle of the 20th century, societal norms started to shift, and women began taking on more independent and diverse roles outside the home. There has been an increase in the number of women who became entrepreneurs, government leaders, key political figures, management/C-suite, and professional athletes.



Despite these changes to women’s lives, there remains a high volume of ads with women in conventional roles. In 57% of ads, women are portrayed in the “stereotypical” maternal or spousal roles (Figure 3). This contrasts with 4% of ads showing women as athletes, 3% as STEM Professionals, and 2% as business owners. Corresponding with the portrayal of women in traditional roles, more than half of ads today still depict women in the home. 52% of ads with women take place in the living room, kitchen, and bathroom (Figure 4). Only 14% of ads show women in the office or place of work. At first glance, the volume of ads with women in conventional roles and locations might seem regressive and continue to lag reality. However, the story isn’t so simple, as evidenced by the analysis of GEM[®] scores by tercile. (See Figures 5 and 6)

Figure 3: Share of Ads with Women by Role

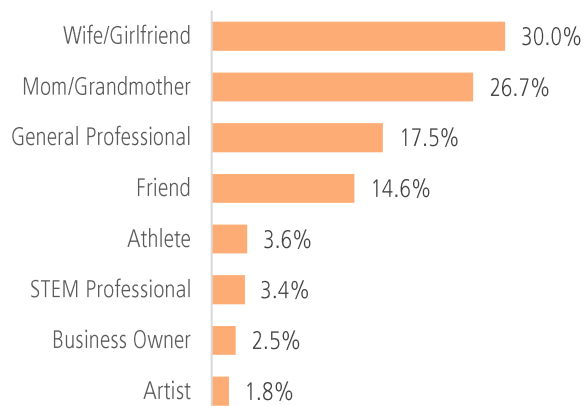
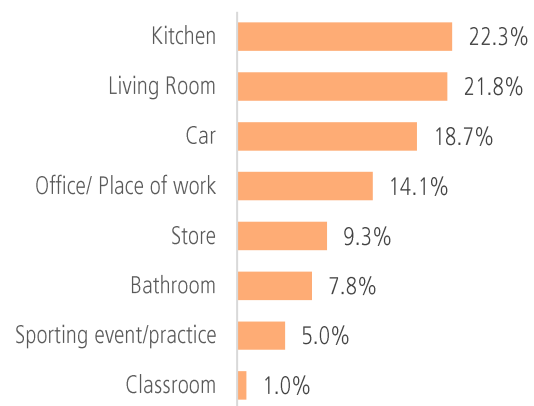
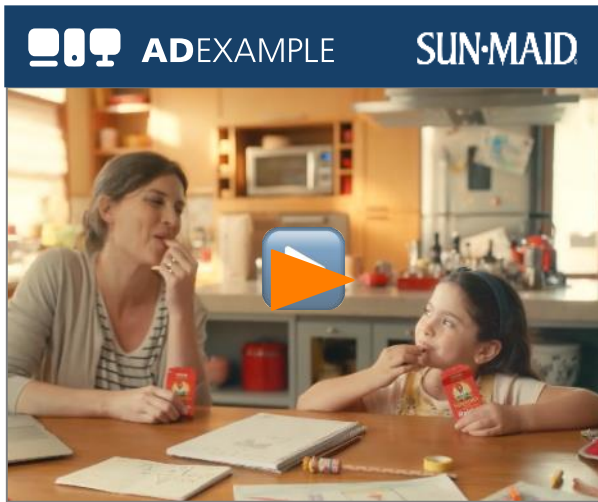


Figure 4: Share of Ads with Women by Location



Source: Ipsos GEM[®] Database – 926 ads

Source: Ipsos GEM[®] Database – 926 ads



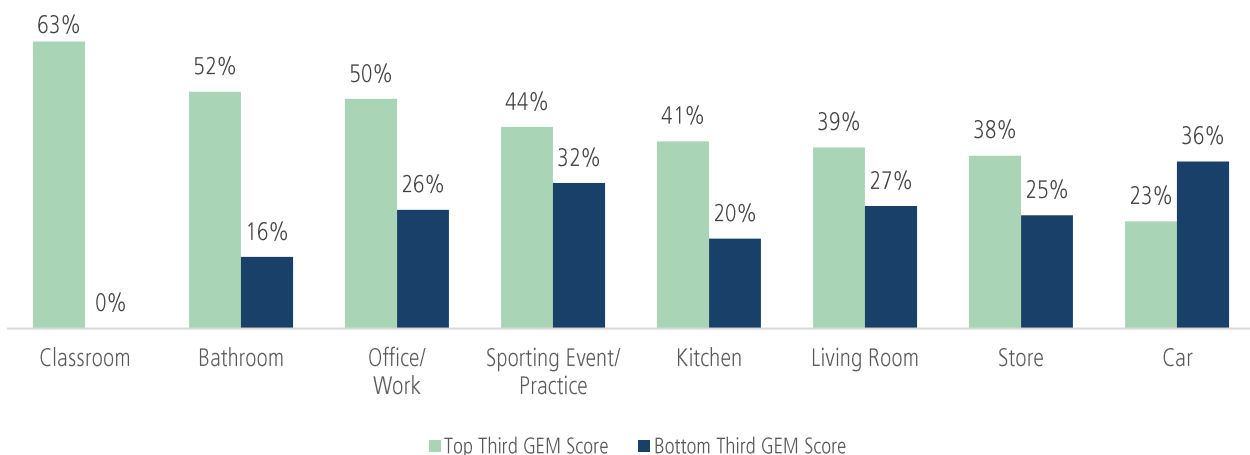
Some locations like the classroom and sporting events have higher GEM[®] scores but are also used less frequently. Ads depicting women in the home, specifically the kitchen or living room, appear more often but score within the norm. (Figure 5) This demonstrates that brands may set advertising within the confines of the natural places for their products if the story presented is respectful and appropriate. Advertisers that aim to push the boundaries, however, successfully leverage the two other pillars, positive presentation, and portraying women as role models. Focusing on storylines and thematic drivers allows for creative freedom to be successful in traditional settings and roles.

Sun-Maid achieves a top spot for GEM[®] by positioning mom as supportive and caring towards her child – a mom who chooses a high-quality, natural snack. The high GEM[®] score is driven by two pillars, positive presentation and role model. Her function as a mom and relationship with her child aids to elevate her overall portrayal.

“ At Sun-Maid we treasure our role as Mom’s delicious and nutritious food partner. We also honor her ability to not only inspire her children’s limitless imagination but also imagine her own limitless potential. ”

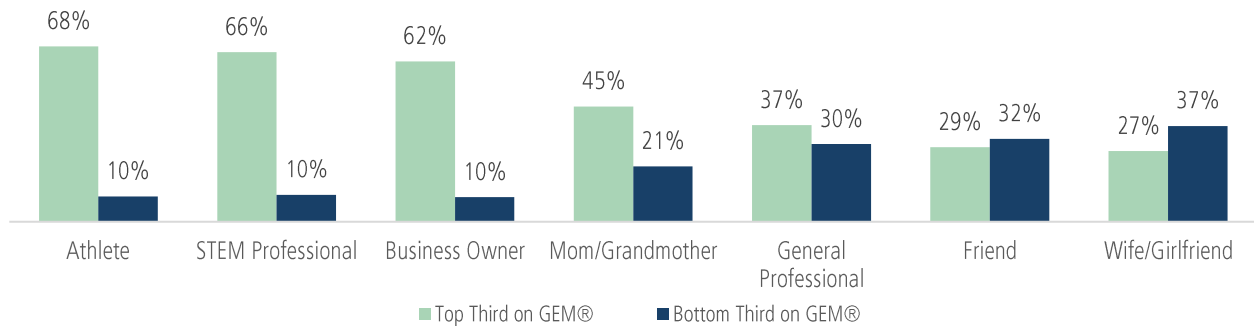
- Fernando Herrera
VP of Marketing at Sun-Maid

Figure 5: Percentage of Ads with GEM[®] Scores by Tercile and Location



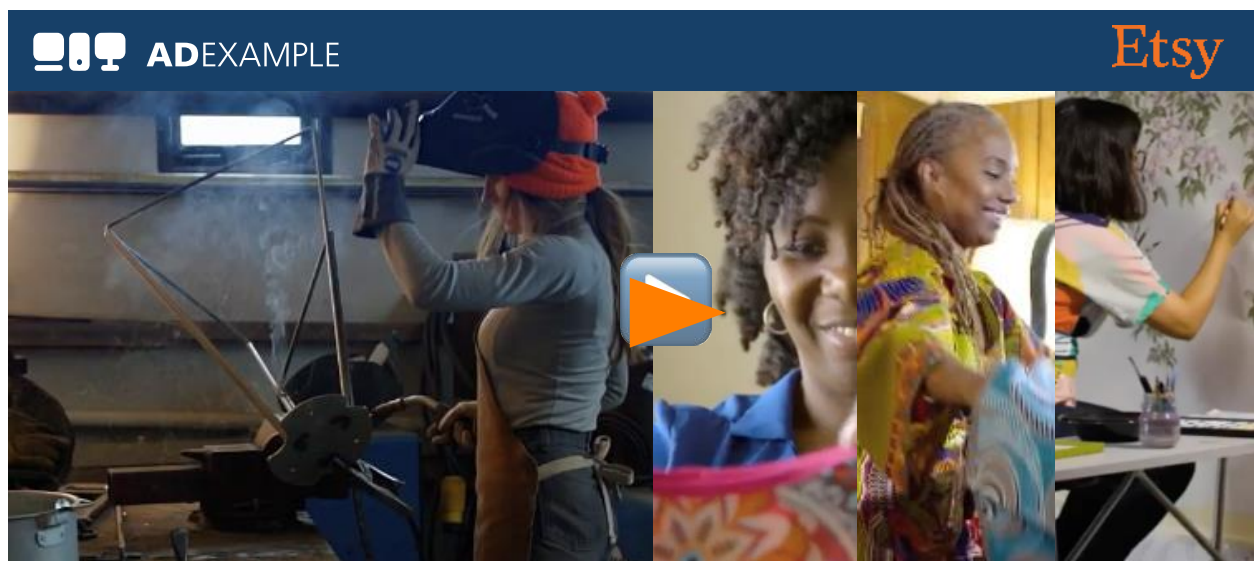
Source: Ipsos GEM[®] Database – 926 ads

Figure 6: Percentage of Ads with GEM® Scores by Tercile and Role



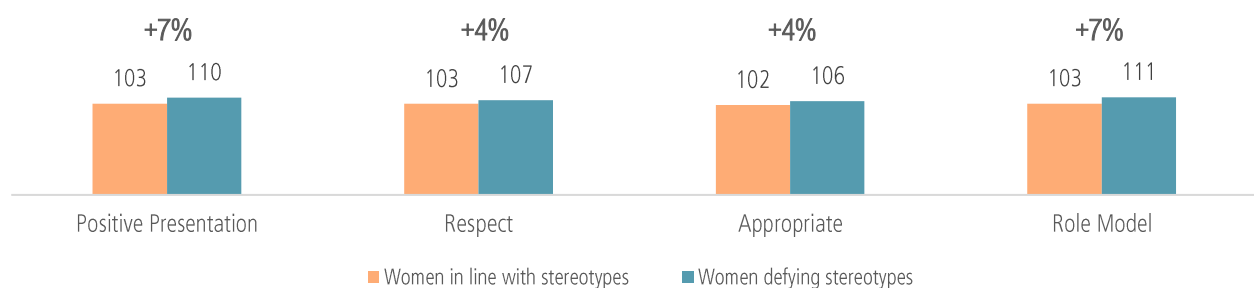
Source: Ipsos GEM® Database – 926 ads

Based on these findings, advertisers can score highly on GEM® by presenting stories of women in non-traditional roles like STEM Professionals, Athletes, or Business Owners (Figure 6). Another way is to show a woman challenging stereotypes, which leads to 56% of ads being in the top third for GEM® and drives positive perceptions of women (Figure 7).



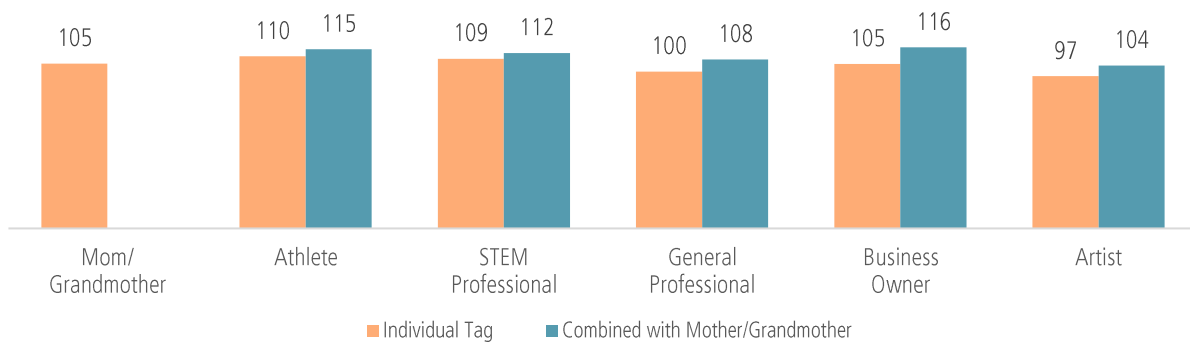
A montage of diverse Etsy sellers is featured in this pandemic-driven spot. Women creators are shown with a wide range of passions and skill sets, with some defying stereotypes and pushing beyond traditional gender roles.

Figure 7: Defying stereotypes drives positive perception of women



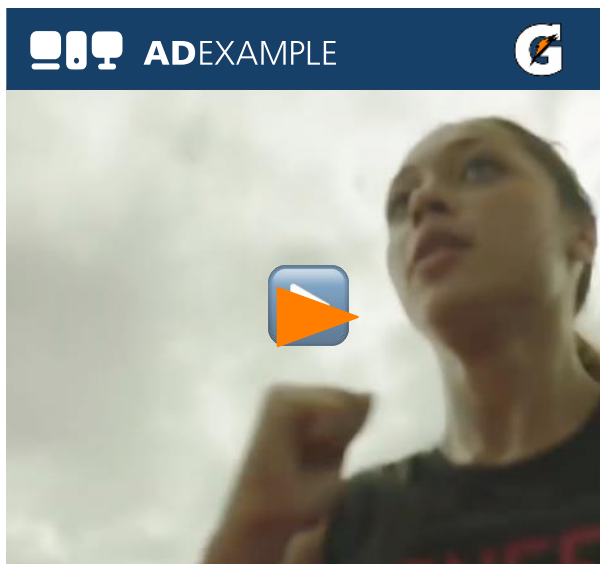
Source: Ipsos GEM® Database – 926 ads

Figure 8: GEM® Scores for Ads with Maternal Figure in Combination with other Roles



Source: Ipsos GEM® Database – 926 ads

Ads that show women in intersecting roles can be more effective in their portrayal of gender equality. 56% of U.S. women between the age of 15 and 50 are mothers and 54% have been married⁶. Especially in today’s world, there is no longer a strict division between professional and domestic life and various duties have become blurred. Advertising can successfully reflect the new roles women have taken on in addition to being mothers and wives. According to our research, ads with a maternal figure in combination with other roles have higher GEM® scores than just individual roles (Figure 8).



In this Gatorade ad, Serena Williams encourages her baby daughter to play sports not for professional success but for the values and lessons you learn that transcend the game, like being strong and never giving up.

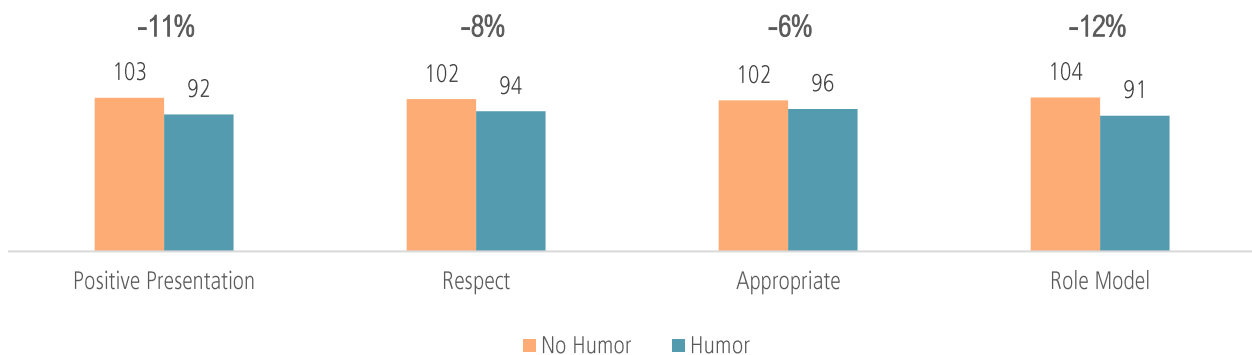
“ At Gatorade, showcasing and celebrating female role models is imperative to our business. We know the power that sport can have to unlock potential, and our ambition is to ensure that the next generation of young athletes can see themselves in our brand. ”

– Brandi Ray
Head of Consumer and Athlete Engagement at Gatorade

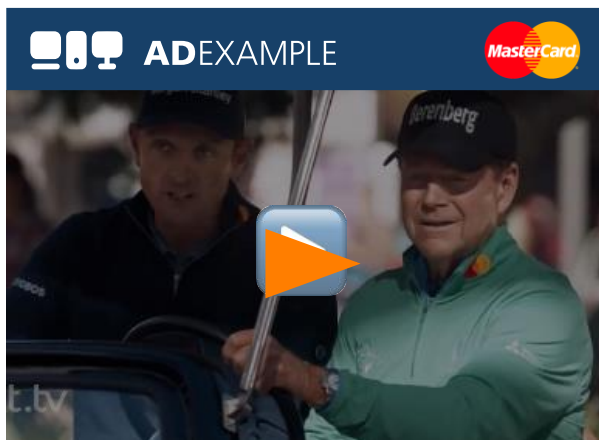
[6] U.S. Census Bureau, Current Population Survey, June 2018. Women’s Number of Children Ever Born by Age and Marital Status: June 2018

A key challenge is delivering positive portrayals of women in a humorous execution. This is important to understand because humor is a vital tool to help ads breakthrough in the cluttered media environment. Humor in ads results in a 13-point lift on our breakthrough index on average⁷. Yet humor is attempted less often when women are in the lead role of an ad. In fact, humor is only used 26% of the time when the woman is integral to the story, but when a man is more prominent, it is used 42% of the time. More importantly, when humor is used, ads struggle on gender equality metrics, scoring 9% lower on the GEM[®] index versus ads with no humor (Figure 9). However, tricky humorous executions and high GEM scores can align, as in the two examples below. In each, the humor is not directed at the women but embedded in the narrative, leading to overall positive portrayals.

Figure 9: The impact of humor on GEM[®]



Source: Ipsos GEM[®] Database – 926 ads



In this MasterCard ad, professional golfers are narrating a man's failed attempt at buying a drink from a vending machine with cash. The man lets the woman behind him “play through” and she gives the drink she bought to the man, doing a nice deed. The high GEM[®] score is driven by two pillars, positive presentation and role model.



This Mass Mutual ad tackles the idea of financial planning for momentous events in people’s lives humorously, while scoring highly on positive presentation. The scene starts with a traditional father and daughter dance for a wedding. Contrary to expectations, the two bust out some funny dance moves as everyone cheers.

[7] Ipsos Meta-Analysis of 5,153 ads from 2015-2021

THE POSITIVE PORTRAYAL OF WOMEN IS NOT ONLY GOOD FOR SOCIETY, BUT IT IS ALSO GOOD FOR BUSINESS.

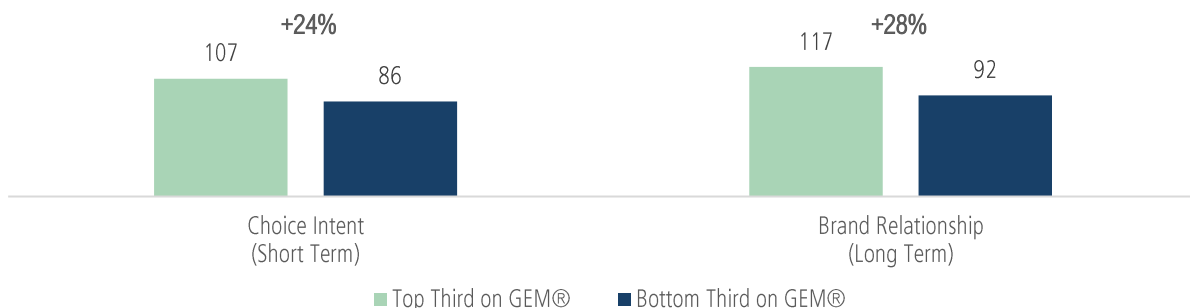
Our exploration of the thematic drivers and best practices that enable an ad to positively portray women leads to the question of why it matters to marketers. Based on our findings, ads that deliver more elevated portrayals of women are significantly more likely to drive short-term sales and build a stronger long-term relationship with the brand (Figure 10). Choice Intent and Brand Relationship are validated predictive metrics for brand choice and affinity. Ads that perform in the top third of the database for GEM® results score 24% and 28% higher on choice intent and brand relationship, respectively. **Positive portrayals have a clear payback for brands.**

“ For the first time, Ipsos has demonstrated for SeeHer Members, and the wider marketing community, that the positive portrayal of women and girls, as measured by GEM®, is significantly predictive of in-market success of advertising. This reinforces the value of early refinement of advertising creative pre-launch to enable commercial performance in combination with strong female representation. ”

Lindsay Franke,
Head of Creative Excellence, US, Ipsos



Figure 10: Ads that perform in the top third of the database on GEM® brand choice and brand relationship, respectively.



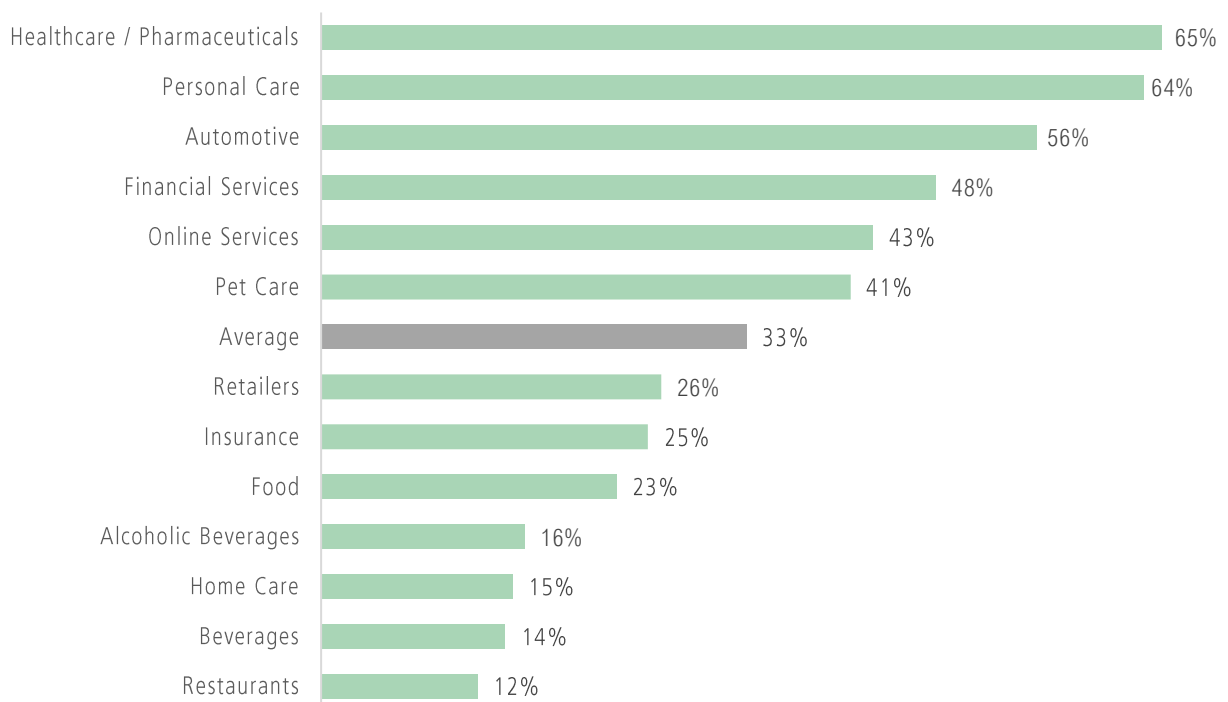
Source: Ipsos GEM® Database – 926 ads. Consistent trends seen globally.



Women account for over **\$6.4 trillion** of spending annually in the United States and **83% of all consumer purchases** are made or influenced by women⁸

Despite women making up half of the U.S. population and being the primary decision makers for their household, positive ad portrayals remain uneven across spending categories (Figure 11). Women account for over \$6.4 trillion of spending annually in the United States and 83% of all consumer purchases are made or influenced by women⁸. However, there’s a variance in the portrayal of women across categories targeting women, and improvement should matter to all advertisers, even in the categories that traditionally focus on marketing to men. Only 12% of restaurant ads, 14% of beverage ads, and 15% of home care ads, are in the top third for GEM[®], a stark underperformance for these categories.

Figure 11: Percentage of Cases by Category in the Top third of GEM[®] database



Source: Ipsos GEM[®] Database – 926 ads

[8] Catalyst, Quick Take: Buying Power (April 27, 2020). <https://www.catalyst.org/research/buying-power/>

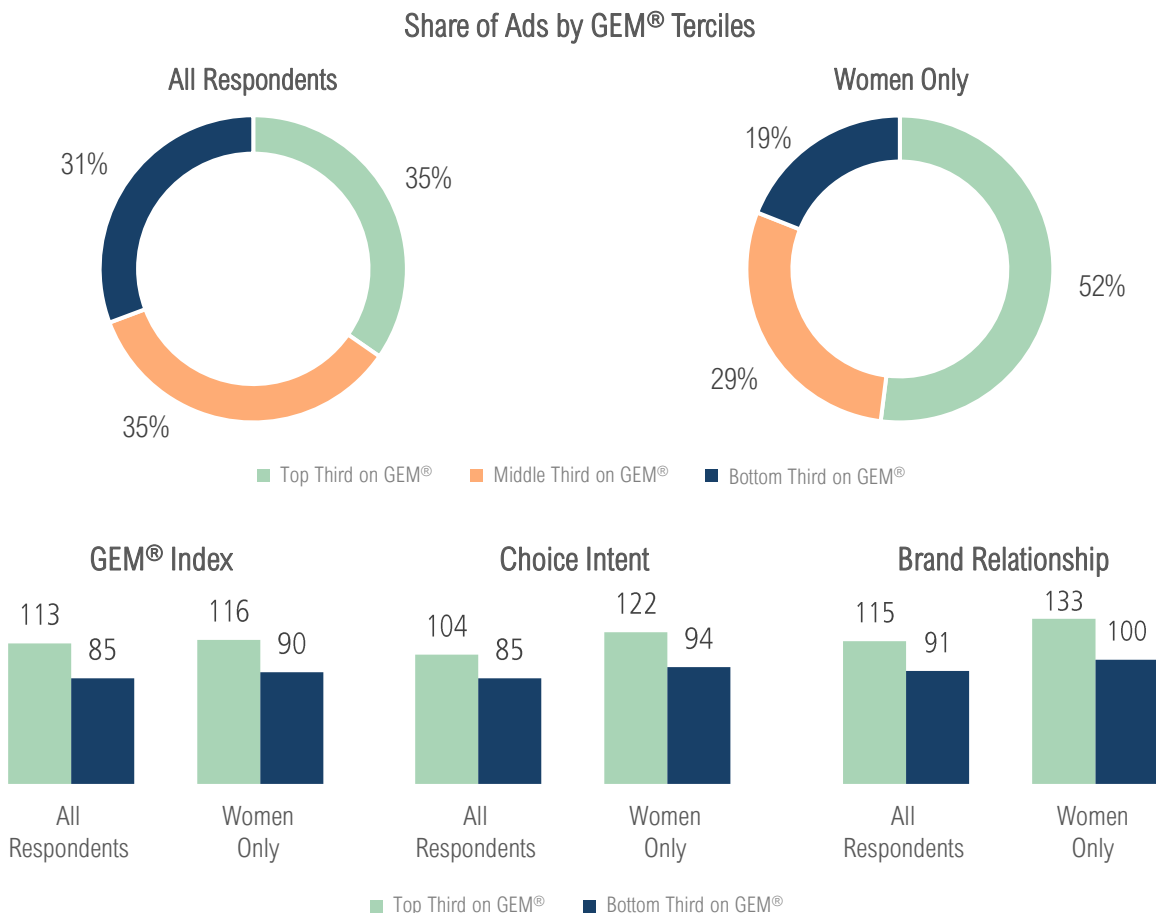
Some categories like **healthcare, personal care, automotive, and financial services** have the highest proportion of ads scoring in the top third for GEM[®],

likely reflecting the case that their products and advertisements are targeted for women and are more in touch with how women want to see themselves.



We see this in our research in which ads targeting women are judged to have more positive depictions of women (Figure 12). There were 100 ads in our dataset that had women-only respondents. More than half of the ads evaluated by women-only panels are in the top 3rd for GEM[®] compared to a third for all respondent panels. These ads also perform better on average GEM[®] scores, Choice Intent, and Brand Relationship across the board.

Figure 12: Advertisers targeting women are particularly effective



Source: Ipsos GEM[®] Database – 926 ads with 100 ads shown to women-only panels

CONCLUSION

Our analysis indicates that it is possible to identify predictive creative themes that will result in advertising depicting women in more positive ways. Consumers are looking for richer, more authentic portrayals of women that are relevant and reflect real-life experiences. Challenging stereotypes by portraying women in less-expected job roles, human relationships and locations is effective at achieving positive results. Themes and narratives in which women are protagonists – such as making life changes or pursuing passions – are also strong themes that might be utilized for creative optimization. And traditionally female characteristics such as being warm and maternal can work if advertisers think about these qualities as role models and intersectional to other aspects of female portrayals.





Advertising has long held the power to influence and shape cultural perceptions. As consumers' awareness and expectations of gender equality increases, having predictive drivers of success becomes even more critical. Leveraging these GEM® best practices provides marketers with guideposts on creating more representative and authentic depictions of women. This in turn impacts how women are perceived in our society and can fuel short-term sales and build stronger long-term relationships with brands.



GEM[®] RESEARCH MODULE

In support of the SeeHer movement to improve gender representation in advertising, Ipsos includes the GEM[®] questions in all its creative assessment research projects when an advertisement includes a woman.

GEM[®] ASKS CONSUMERS TO EVALUATE THE PORTRAYAL OF WOMEN IN CONTENT THAT THEY HAVE SEEN IN FOUR WAYS:

 <p>PRESENTATION</p> <p>What is the overall opinion of the female presented?</p>	 <p>RESPECT</p> <p>Is she portrayed respectfully?</p>	 <p>APPROPRIATE</p> <p>Is she depicted inappropriately?</p>	 <p>ROLE MODEL</p> <p>Is she seen as a positive role model for women and girls?</p>
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To generate the total GEM[®] Index score, each measurement characteristic is benchmarked and indexed against the average score for that characteristic. The total GEM[®] Index score is the average index of the of the four characteristics giving equal weight to each input. An index of 100 signifies an average score for an ad.

GEM[®] PREDICTIVE DRIVERS METHODOLOGY & ANALYSIS

Ipsos collected data from 2019-2021 using the GEM[®] questions for 926 ads with female character portrayals, across various ad lengths and formats.

Market: United States

Sample: A18-65 (mix of male and female respondents)

Categories: Alcoholic Beverages, Restaurants, Home Care, Beverages, Food, Insurance, Financial Services, Retailers, Cable/Telecom, Pet Care, Automotive, Personal Care and Healthcare / Pharmaceuticals.

To evaluate the dataset, we split the GEM[®] Index scores into terciles. We identified how creative themes performed as predictors of positive female portrayals by analyzing ads that fell in the top third of the GEM[®] index scores (108 or higher) versus those that fall in the bottom third of the GEM[®] index scores (99 or less).

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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

About SeeHer

SeeHer is a global coalition of committed marketers, media leaders, agencies and industry influencers united in the mission to increase the accurate portrayal of women and girls in marketing, advertising, media, and entertainment, so they see themselves as they truly are and in all their potential. Led by the Association of National Advertisers (ANA), in partnership with The Female Quotient (The FQ), SeeHer has become the industry's leading global voice for gender equality in advertising and media. To help benchmark success, in 2016 SeeHer developed the **Gender Equality Measure (GEM®)**, the first research methodology that quantifies gender bias in ads and programming. GEM® has become the global measurement standard, measuring 200,000+ ads, representing 87 percent of worldwide ad spend. SeeHer also developed **#WriteHerRight Guides** to encourage content creators to address potential blind spots and unconscious biases and integrate more authentic and nuanced depictions of women into their work. To address the specific inequities in the sports and music industries, SeeHer launched two verticals: **SeeHer in Sports** and **SeeHer Hear Her**. Gender equality and intersectionality in advertising and media is an imperative. It is good for business and good for society.

About Ipsos

At Ipsos we are passionately curious about people, markets, brands, and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions. With a strong presence in 90 countries, Ipsos employs more than 18,000 people and conducts research programs in more than 100 countries. Founded in France in 1975, Ipsos is controlled and managed by research professionals.