THE CONSUMER REPORT

Outvertising

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INTRODUCTION

Why did we set out to create a better understanding of the UK's LGBTQIA+ community?

Our motivation is rooted in Outvertising's purpose, which is to **make UK advertising and marketing completely LGBTQIA+ inclusive.**

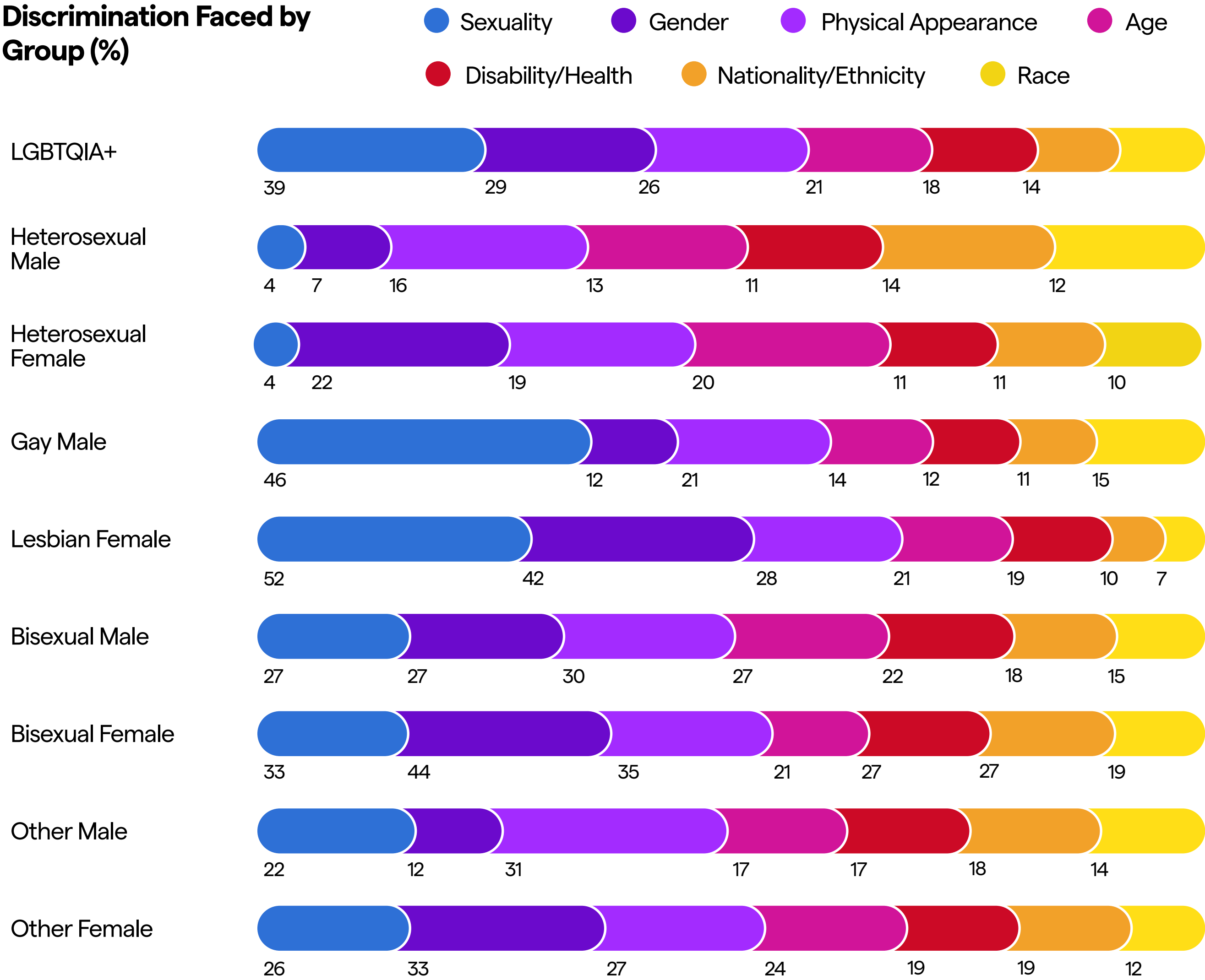
As brand marketers and agency leaders, we lacked a reliable resource on the LGBTQIA+ community and their relationships to brands. In conversation with colleagues at the Market Research Society, we developed a partnership with YouGov. With a shared vision, we committed to bring a UK LGBTQIA+ brand census to life. This report is the product of these partnerships. We trust it will become an important part of every brand and agency leader's inclusive marketing toolkit.

Why does LGBTQIA+ representation matter to brands and businesses?

We know that LGBTQIA+ inclusion works. According to Kantar Millward Brown, 3 out of 4 LGBTQIA+ themed ads outperform generic ads in driving brand recall. Think with Google reports that 45% of consumers under 34 say they are more likely to do repeat business with an LGBTQIA+ friendly company.

Smart businesses understand that building brand allegiance is a key metric for success. There are an estimated 7 million adults who identify as LGBTQIA+ in the UK. They are members of networks including friends, family, allies, and co-workers. Collectively, LGBTQIA+ inclusive marketing - or its absence - touches every one of those individuals.

Discrimination Faced by Group (%)



Stonewall

According to Stonewall, “the sad reality of LGBTQIA+ people in the UK today is that they have more reasons to be worried and scared to simply go on about their daily lives.” As an aggregate, the most likely factor of identity to have been the source of discrimination in Britain today is sexuality, across all subsegments of the LGBTQIA+ community. Nearly 40% of Gen Z, Millennials and Gen X say that they have personally experienced discrimination. The role for brands is more important than ever to communicate meaningfully and positively about the LGBTQIA+ experience.

As marketing professionals, we are privileged to work in a sector that has a history of changing perceptions and fostering social change.

> We believe that we have a responsibility to bring about greater LGBTQIA+ acceptance in society by using the power of media & advertising for good.

LGBTQIA+ inclusion in marketing has been proven time and time again to positively affect brand affinity, reputation, and sales.

And, it allows for people in our community to see themselves on TV, billboards, in radio and print - which strengthens identity, promotes acceptance, and ultimately, contributes to better quality of life for members of the community.

For all these reasons, we believe it is imperative for brands to activate on the findings found within this report.

Lucy McKillop & Marty Davies
JOINT-CEOS, OUTVERTISING

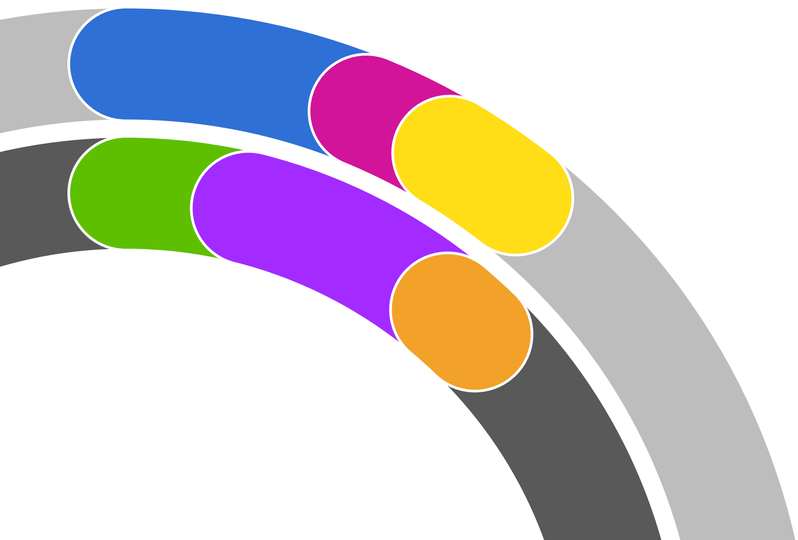
1. LGBTQIA+ IN THE UNITED KINGDOM

This report is fuelled quantitatively by YouGov Profiles datasets. The sample represents roughly 230,000 people living in Great Britain, aged 18+. The sample size fluctuates on a weekly basis but a typical distribution includes:

Non-LGBTQIA+	**205,636**
LGBTQIA+	**21,763**
Gay/Lesbian	**10,000**
Bisexual	**12,000**
Don't Know	**2,753**
Other	**3,388**
Prefer not to say	**8,000**

> Intersectionality is a critical vehicle through which to develop awareness, empathy, and engagement with the LGBTQIA+ community.

Heterosexual Females:	115,804
Heterosexual Males:	83,569
Lesbians:	3,056
Gay Males:	6,839
Bisexual Females:	8,037
Bisexual Males:	3,749
Other Females:	2,276
Other Males:	1,112



"Do you identify as LGBTQ+ (lesbian, gay, bisexual, transgender, queer, non-binary, etc.)?" This is the primary question to assess sexual and gender identity in the YouGov Profiles panel. The power of YouGov Profiles is undeniable. The LGBTQIA+ community is broad and diverse and any aggregation simplifies the diversity. [2]

However, legacy screeners and systems currently only allow for a capture of profiles that specifically index as "gay","lesbian" "bisexual", "don't know", or "other". *This unfortunately fails to capture some segments of the community.* Sexual identities such as 'pansexual', 'polysexual', 'asexual' may be represented within this dataset but we are unable to confirm this with accuracy. YouGov plans to include additional options in the future.

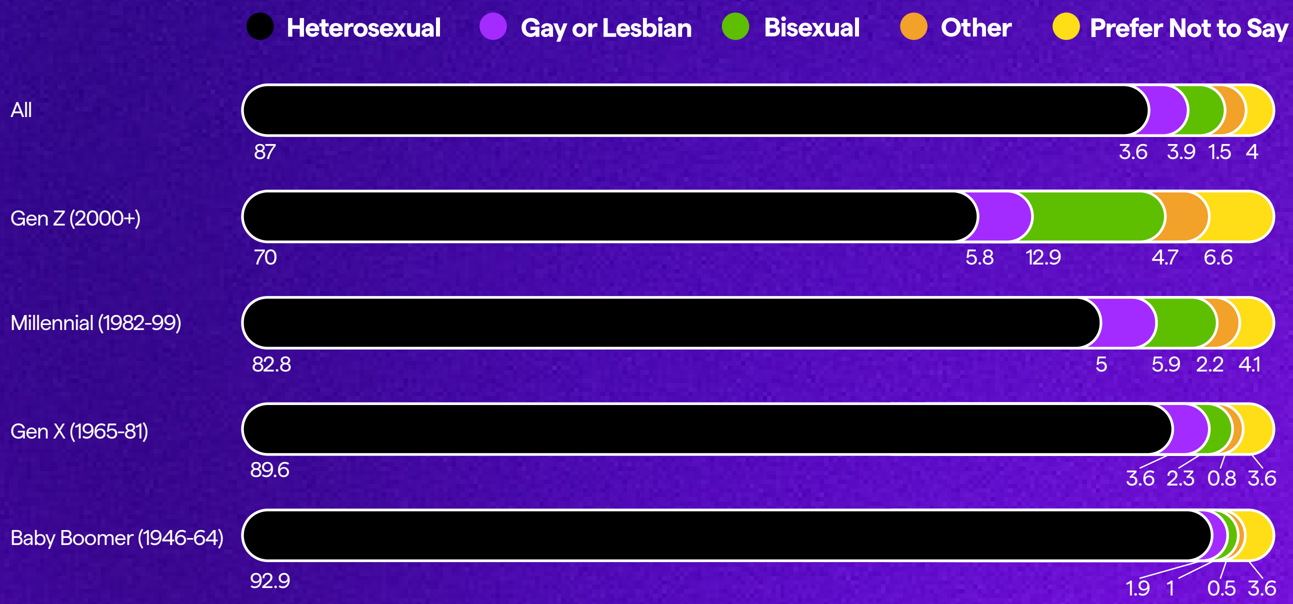
The ethnic profile of the sample is 84% White, 4% Black, and 8% Asian. The YouGov dataset captures binary gender distinctions of male and female, but not Trans+ identities.[3] The existing sample skews more male than female (58% vs 42%), with a greater proportion of gay males than lesbians, but a higher proportion of bisexual or other females than bisexual or other males.

[1] All total counts of respondents represented here are unweighted, while figures throughout this report refer to a weighted sample, 17 September 2023.

[2] Throughout this report, we use the collective acronym LGBTQIA+ as a standard index of the community, and based on the most up-to-date guidance on inclusion that Outvertising has adopted. We recognise that our primary dataset, YouGov Profiles, uses the more limited LGBTQ+. Both the 'etc.' in the standard screening question, as well as the + in the standard acronym indicates to us that additional profiles are likely captured in the sample. However, we do not presume to be speaking on behalf of any individual subsegment unless clearly indicated in the dataset. We use Trans+ to be inclusive of the many ways people describe and define their gender or absence of gender.

[3] As recently as 2021, the ONS added 'gender identity' as a question in their Census, which is heartening as it will help to build a fuller picture of the community. In the 2021 census, a total of 262,000 people (0.5%) answered "No", indicating that their gender identity was different from their sex registered at

Which of the following best describes your sexuality?

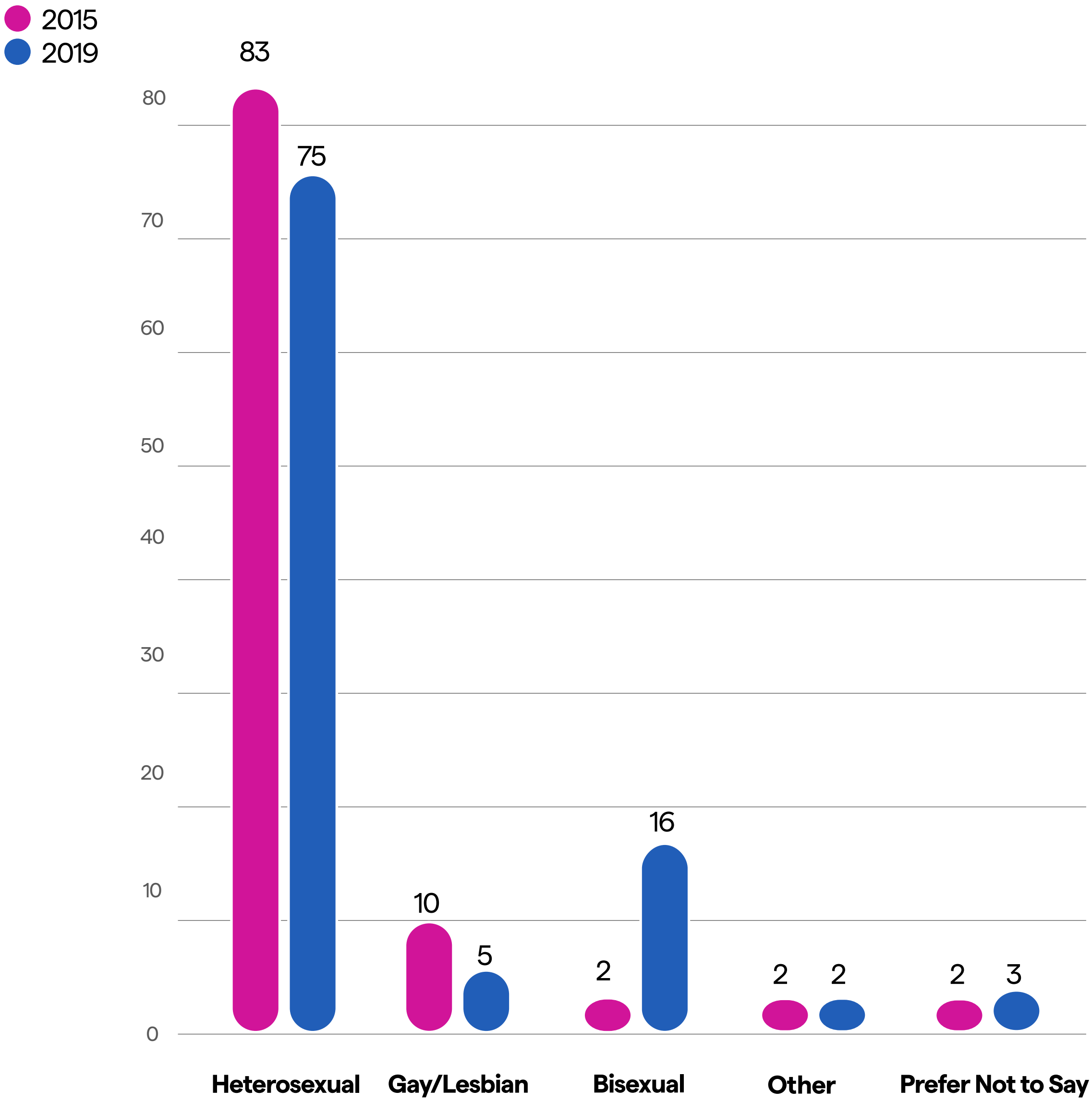


> **18-24** **year olds**
> **are half** as likely to
> **identify** as **gay/lesbian** and
> **8x more likely** to **identify** as
> **bisexual** than they were in **2015**

Age plays a significant factor in understanding the collective dynamics of the LGBTQIA+ community, with the total sample skewing younger than the non-LGBTQIA+ cohort. While historical forces such as the HIV/AIDS pandemic impacted the longevity of the community, contemporary progress has enabled a greater openness for younger generations. This is reflected in the distribution of the age-sexual identity cohorts in the sample.

Further indication of this dynamism is reflected in an earlier survey[4] conducted by YouGov which approached sexuality as a factor of identity that lies on a spectrum (2015, 2019). YouGov asked Britons where they would place themselves on the Kinsey scale of 0 to 6, where 0 is completely heterosexual and 6 is completely homosexual. On the whole, Britons in 2019 were slightly more likely to place themselves somewhere in between the two extremes of 0 and 6 than they were in 2015.

[4] One in Five Young People Identify as Gay, Lesbian or Bisexual. YouGov. July 2019.



For those aged 18-24, the number of respondents who would call themselves gay or lesbian was halved during that same period. Yet, they were 8 times more likely to identify as Bisexual. Sexual identity is a dynamic, fluid category and we expect this will only continue to fluctuate with real numbers out of reach of any survey.

When it comes to geographic distribution, the LGBTQIA+ population largely mirrors national distribution with a few exceptions: the highest proportion of Gay Males lives in London, the highest proportion of Bisexual Females and Lesbians lives in the South, and the highest proportion of Bisexual Males lives in the North. Moreover, more of the LGBTQIA+ audience lives in Urban Areas (vs Rural or Town/Fringe locations), slightly higher than the general population and concentrated in 3 counties: Greater London, Greater Manchester, and the West Midlands. When planning regional vs national campaigns, these splits could be something to bear in mind.

2. THE "ETC." IN THE DATA AND IN THE WORLD

Last year, the UK saw an increase in hate crimes against Trans+ people by 11% in a year, and by 186% in the last five years (Stonewall). These numbers are an estimate at best given that the vast majority of the LG-BTQIA+ community who experience hatred and violence do not report it.

Unfortunately, Trans+ representation in the data is limited. While YouGov has been working to create a more inclusive mechanism for collecting data for Profiles, other potential partners also struggled to find the sample sizes necessary to build accurate stories.

Stonewall and YouGov have created the Trans Report - with 871 Trans+ and non-binary people taking part. This is a promising source of information, however the types of longitudinal data that we have for other communities does not currently exist for the Trans+ community.

Statistically, at 0.5% of the total population, the Trans+ community is small. Smaller still is the number of individuals who are willing and ready to talk about their experiences as Trans+ in relation to brands and marketing. We are grateful for the conversations we had with numerous partners for quantitative research, which helped us to see the data collection challenge more clearly. Ultimately, we resorted to a qualitative route to augment our YouGov profiles data. [5]

At the moment, the methods of collecting data on gender identity are limited. While we are seeing incremental improvement and growth in these areas, it is clear that the infrastructure is not set up yet - which could drive apathy and feelings of frustration, and ultimately result in a lack of representation.

> If an organization working hard to provide Trans+ inclusion in advertising struggles to create an inclusive process for including Trans+ voices in our advertising and marketing research, what does that say about the industry as a whole?

[5] Participants were recruited from the extended networks of partner organisations including Transactual, Not a Phase, Global Butterflies, and Gendered Intelligence. Participants were invited into a series of 90 minute roundtable discussions in October/November 2023.

"

LGBTQIA+ inclusivity in our data collection is a priority as we work to maintain proportionate panel representation and keep up with the evolving needs of diverse audiences and communities. In line with our purpose of giving the world a voice, we are dedicated to working with Outvertising to build further insight into this community, especially the harder to reach segments (e.g., TIA+).

"

Thomas Zaqueu

DIVERSITY & INCLUSION MANAGER, YOUGOV

3. THE LGBTQIA+ RECOMMENDED BRANDS LEADERBOARD

Which brands are winning and have the potential to continue to win with the LGBTQIA+ community?

We looked at the brands that the community is most likely to recommend as well as brands that are at a statistically significant variance with the non-LGBTQIA+ population. Recommendations are an important metric given that the LGBTQIA+ community loves to recommend things for people to try (67% vs 49% non-LGBTQIA+, rising to 75% of Gen Z LGBTQIA+). Further, recommendations are holistic in the sense that they indicate affinity and active appreciation. We have also included top ranked brands as well as key over-indexes for segments of the LGBTQIA+ community.

What does it take to land a brand on the LGBTQIA+ Recommended Brands Leaderboard?

This report is designed to provide leaders in marketing, advertising, and media with a series of snapshots for potential success. These snapshots include the cultural, commercial, and category dynamics that are foundational to developing messages, experiences, and products that will resonate.

Recommended Brands by the LGBTQIA+ community vs non-LGBTQIA+ (%)

		Comment	LGBTQIA+	Non-LGBTQIA+
BANKS	monzo	Highest Ranked Over-Index	15	10
RETAIL	IKEA	Highest Ranked Over-Index	52	46
	BUILD-A-BEAR EST. 1997	Bisexual Females (25%) Gen Z (28%)	17	11
FASHION	M&S EST. 1884	Highest Ranked Under-Index	34	47
	H&M	Greatest Over-Index	31	25
HIGH STREET	M&S EST. 1884	Highest Ranked	44	48
	LUSH	Greatest Over-Index	23	15
ALCOHOL	BAILEYS	Top Rank for Both Populations	30	30
		Top Rank For Gay Males	36	
	SMIRNOFF	Greatest Over-Index	28	20
	ABSOLUT.	2nd Greatest Over-Index	20	13
HEALTH & BEAUTY	BULL DOG	Greatest Over-Index	13	9
	NYX PROFESSIONAL MAKEUP	Greatest Over-Index	10	5
CASUAL DINING	PIZZA EXPRESS	Greatest Over-Index	29	22
	Nando's	Highest Ranked	34	28

		Comment	LGBTQIA+	Non-LGBTQIA+
HOTELS & CRUISES	Premier Inn	Highest Ranked	15	10
	airbnb	Greatest Over-Index Gen Z LGBTQIA+ (30%)	52	46
BROADBAND	Virgin media	Greatest Over-Index	17	11
	O_2	Highest Ranked	34	47
SUPERMARKETS	ALDI	Highest Ranked Significant Under-Index for Sainsbury's & ASDA	31	25
VIDEO GAMING	Nintendo	Highest Ranked	44	48
SNACK FOOD	OREO	Greatest Over-Index	23	15
	PRINGLES	Highest Ranked	30	30
AUTOMOTIVE	Ford	Highest Ranked	28	20
	MINI	Greatest Over-Index Gay Males	20	13
TV & RADIO	NETFLIX	Highest Ranked Bisexual Women (65%)	13	9
	Disney+	Greatest Over-Index Bisexual Women (46%) Gen X LGBTQIA+ (42%)	10	5
SPORTING EVENTS		Highest Ranked	13	9
	FIFA WOMEN'S WORLD CUP	Greatest Over-Index LGBTQIA+ Baby Boomers, Lesbians (28%)	10	5

4. LGBTQIA+ & ADVERTISING: READY BRAND CHAMPIONS

First, a good word about advertising.

> The LGBTQIA+ community is a vibrant and receptive audience for advertisers.

What sets them apart is their high propensity to recommend products and services they encounter in advertisements. A whopping 67% of LGBTQIA+ individuals are likely to recommend something they see in ads, compared with just 49% of their non-LGBTQIA+ counterparts.

This receptivity extends to the persuasiveness of advertising as well. LGBTQIA+ individuals are more likely to be swayed by advertisements, with 40% reporting a favourable response compared with 31% among non-LGBTQIA+ individuals.

LGBTQIA+ audiences have a higher level of expectation of advertising in general: it should be entertaining and feature 'real people'. Tailored advertising strikes a chord with this audience, leaving a positive and more lasting impression.

Perhaps most importantly, LGBTQIA+ people in the UK are more likely to say that brands should express their views on political or social issues, with 60% sharing this stance (vs. 41%). Unsurprisingly, they are also more likely to reject a brand if the brand's views are not in alignment with their own, outpacing their non-LGBTQIA+ counterparts (64% vs 50%).

Acceptable issues for brands to communicate their view in marketing materials or other communications (%)	LGBTQIA+	Non-LGBTQIA+
Environmental Issues	63	35
Human Rights	62	24
LGBTQIA+ Rights	58	10
Animal Cruelty	56	29
Gender Issues (me too, feminism)	45	8
Aligning with Charities	35	18
Local Issues	34	16
Aligning with Geographic Regions	32	9
International Issues	31	9
Immigration	29	8

What types of things does our audience want to see in a creative message? For brands seeking to connect with the LGBTQIA+ community, the message is clear: embrace authenticity, showcase diversity, and align with social consciousness.

This discerning audience craves genuine messaging that resonates with their experiences and aligns with their values. Data reveals a strong preference for brands that champion LGBTQIA+ rights (58% vs 10%), gender equality (45% vs 8%), environmental sustainability (63% vs.35%), and universal human rights (62% vs 24%).

Statements agreed with about advertising

%	LGBTQIA+	Non-LGBTQIA+
Companies and their brands should be able to express how they feel on a topic	64	44
I think brands should express views on political or social issues	60	41
I expect adverts to entertain me	55	48
I like brands that are willing to get involved in social issues	59	37
I like seeing “real looking people” in ads	70	64
I skip through the ads on programmes I’ve recorded	80	81
I’m more likely to engage with advertisement on social media than on regular websites	43	23
If a brand holds a view I disagree with, I will stop buying from them	64	50
If a brand I like expresses a view I agree with in advertisements, I’m more likely to buy it from that brand	59	45

TELEVISION

Despite a strong affinity for television programming, LGBTQIA+ individuals are somewhat less likely to find television advertisements captivating, with only 31% reporting that they find them engaging compared with 42% of non-LGBTQIA+ individuals.

ONLINE

This preference extends to traditional online advertising as well, with only 43% of LGBTQIA+ individuals finding regular website ads engaging compared to 51% of non-LGBTQIA+ individuals.

LGBTQIA+ individuals are more receptive to advertising on platforms like social media, podcasts, and cinema.

> **43%** of **LGBTQIA+ individuals** find **social media ads engaging** in comparison with **only 23%** of **non-LGBTQIA+** individuals.

CINEMA

This trend continues with cinema ads, where 24% of LGBTQIA+ individuals find them engaging compared with 14% of non-LGBTQIA+ individuals.

PODCASTS

The emergence of podcasts has also generated relatively more interest for LGBTQIA+ individuals with 12% who find podcast ads captivating compared with 9% of non-LGBTQIA+ individuals.

CHANNEL CONSIDERATIONS

PRIVACY

However, there is concern that tailored, or personalised, advertising is 'creepy'. While personalised advertising can be effective, it is crucial to strike the right balance to avoid alienating the LGBTQIA+ community. Overly tailored or intrusive messages can raise concerns about privacy and data usage, with 72% of LGBTQIA+ individuals expressing discomfort with the amount of information brands seem to have about them.

CHANNEL OPTIMISATION

Additionally, relying solely on ads may not be the most effective strategy. With 80% of all viewers opting to skip ads given the choice, brands need to consider alternative engagement methods, such as creating compelling content, experiences, or other community oriented activities that resonate.

AUTHENTICITY

For brands that get voice, authenticity, values, and message right, the LGBTQIA+ community are ready to be your champions. When done right, this is an opportunity for amplification of brand messages organically and across a variety of channels. Be sensitive about your approach to data security, privacy, and performance marketing.

Adverts tend to go wrong when it's clear they aren't in the community's voice, and the product is more the focus than the marginalised group used to promote it.
As a model and an activist, I've seen both sides of the process, and I've worked on inclusive campaigns that have gone brilliantly and terribly - always with good intentions, but in the negative cases, there's been a lack of community guidance.

> That's why it's essential to have a representative (or multiple) in the room to consult on the work being made. Every campaign I've done that has been creatively lead by people from within the LGBTQIA+ community - concerning those communities with specific insight into the nuances between those experiences - has gone well.

Yasmin Benoit

BRITISH MODEL

AWARD-WINNING ASEXUAL ACTIVIST

FOUNDER OF THE UK'S FIRST ASEXUAL RIGHTS INITIATIVE

CREATOR OF #THISISWHATASEXUALLOOKSLIKE

5. MEDIA: TV ARE WE

If you want to know what to watch or listen to, speak to someone from the LGBTQIA+ community – they are in practice as individuals who enjoy and take pride in their cultural acumen (see also our culture whisperers section). The data also reveals that television is a powerful channel for connecting with this audience, though perhaps not currently optimised for advertising effectiveness.

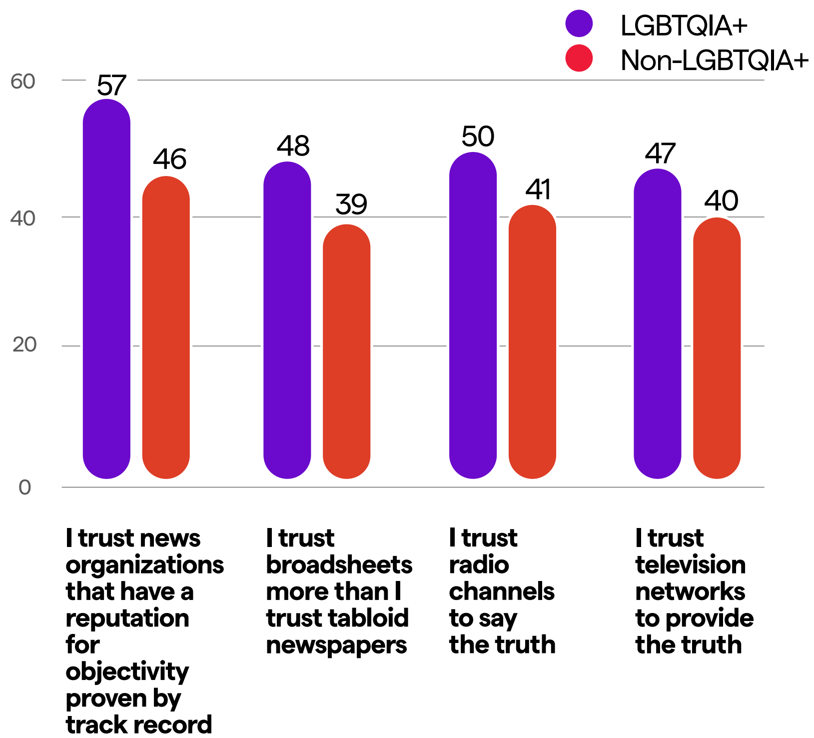
Brands are least likely to connect with an LGBTQIA+ audience via newspapers, especially if that newspaper is in printed format. YouGov data shows that they prefer to access content online, and they are also least likely to trust newspapers for the truth, when compared with radio/tv/magazines.

LGBTQIA+ individuals' view of the role of media at large in British society is on a par with that of their non-LGBTQIA+ peers who believe that British media plays an important role in society (65%) and the state of democracy (59%). They are also of the mind that newspapers should play a broader role in stimulating debate and challenging perspectives (77%).

That said, the LGBTQIA+ community is more suspicious of bias and a lack of objectivity in the news media than their national peers, with the exception of Television Networks, where they over-index on trusting that the truth is told (47% vs 40%). Interestingly, in the case of both LGBTQIA+ & non-LGBTQIA+ respondents, only 27% trust newspapers to print the truth.

Fascinatingly, across the board LGBTQIA+ people actually show a greater likelihood for trust in forms of media including more trust in broad sheets than tabloids, more trust in radio channels and more trust in television to say the truth. Could this be tied to their greater likelihood to "trust news organisations that have a reputation for objectivity proven by track record"?

Trust in various forms of media to provide the truth (%)



CHANNEL PREFERENCES

When it comes to channel preferences, the LGBTQIA+ community says that they notice radio ads and enjoy watching TV ads more than their national peers. They also seem to have a more intimate relationship with TV media – saying that it has the power to influence their emotional state to a greater degree than their national peers (46% vs 33%). As is the case throughout this report, they are seen as the go-to when it comes to suggestions for music/movies/TV shows - with 40% being likely to be a 'go-to-suggester', as opposed to 23% of the non-LGBTQIA+.

> **I spend a lot of time thinking, and talking, about commercial television in the UK. To know that the LGBTQIA+ community is more likely to enjoy watching our ads, and trust television networks to provide the truth, gives me a really interesting brief to consider when speaking to the many brands we work with to help get the best out of TV in all its forms.**
>
> Chris Dunne
>
> HEAD OF MARKETING, THINKBOX

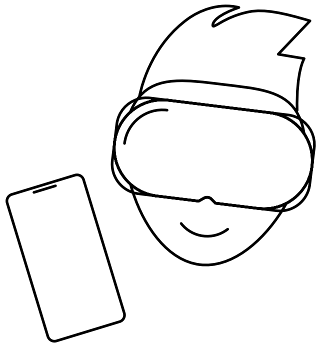
6. LGBTQIA+ SECTOR SNAPSHOTS

The focus of this report is not only on LGBTQIA+ people as individuals, but also as consumers. Like any other customer, they have allegiances to brands and preferences when it comes to specific product categories and commercial sectors.

In developing this report, we explored hypotheses or myths about the LGBTQIA+ consumer and aimed to repudiate or validate those assumptions. What follows is our analyses of several key product categories. These sector snapshots move from categories of high-interest and dynamism to categories where there is a greater challenge, and possibly opportunity, to drive more LGBGTQIA+ inclusive marketing, advertising, and media.

TECH ENTHUSIASTS

Technology is a category of **central importance** to the **LGBTQIA+ population** in the UK. **2x as likely** as their straight counterparts to **identify** as **'tech disciples'.**



INNOVATION ADOPTERS

LGBTQIA+ individuals are a key demographic for tech companies, with a higher propensity for valuing cutting-edge technology and spending more time online than their non-LGBTQIA+ counterparts.

Our research reveals that 3 out of 4 LGBTQIA+ individuals value superfast broadband compared to 64% of non-LGBTQIA+ individuals. This trend extends to internet dependency, with 71% of LGBTQIA+ individuals reporting that they would not be able to cope without the internet, compared with 58% of non-LGBTQIA+ individuals.

This digital readiness translates into increased social media engagement, with 42% of LGBTQIA+ individuals spending more time on social media today than they did a year ago, compared with 37% of non-LGBTQIA+ individuals. Furthermore, LGBTQIA+ individuals exhibit a heightened interest in adopting new technological advancements, with one in ten expressing a keenness to adopt new products as soon as they hit the market, compared with one in twenty of their non-LGBTQIA+ counterparts.

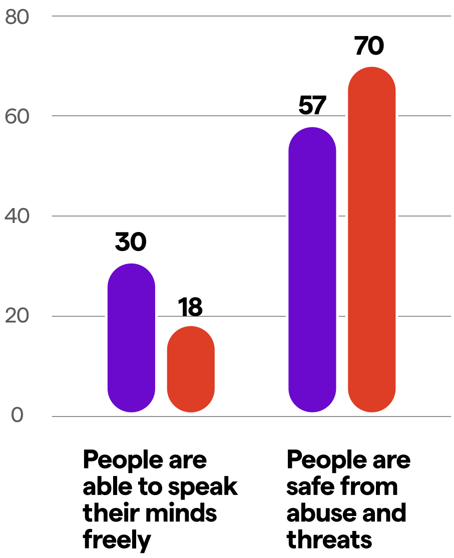
SOCIAL ENGAGEMENT

The majority of this audience mainly use social media for entertainment and news content (63% v 55% non) with lesbians most likely to do so (69%). This audience also greatly prioritises how they present themselves on social media (46% vs 36%, Lesbians 49%, Gay men 45%). And, where just 9% of non-LGBTQIA+ people use social media for flirting or dating, that number jumps to 22% for LGBTQIA+ people and 24% for Gay men respectively.

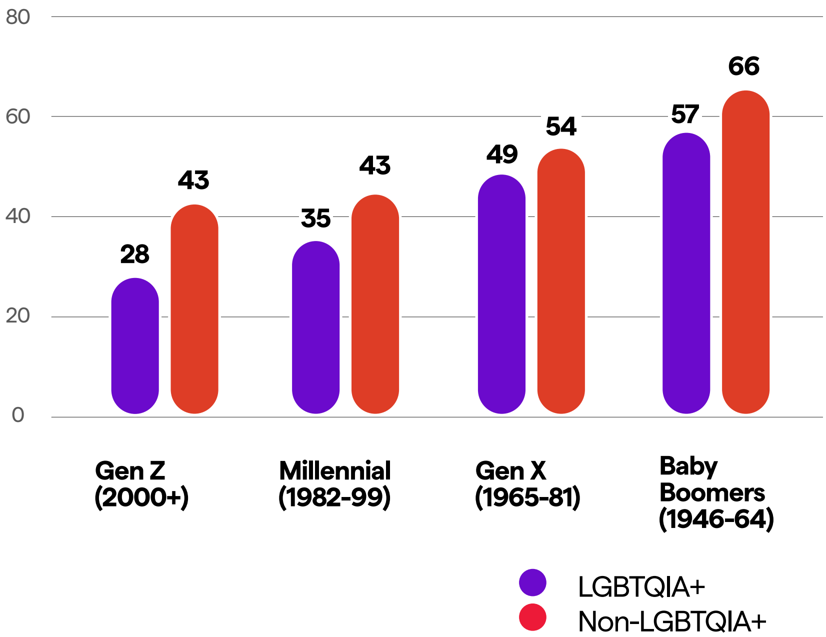
QUALITY DIGITAL LIVES: FREEDOM VS SAFETY

LGBTQIA+ users have a distinct perspective on the necessary dynamics of the digital experience. While the safety of online spaces is important to all audiences, LGBTQIA+ respondents attribute less importance to this dynamic of digital life than their non-LGBTQIA+ peers (57% vs 70%). They also have greater expectations that online spaces should be where people can freely express themselves (30% vs 18%), with bisexual females most convinced of this requirement for digital spaces.

When it comes to online behaviour in the form of comments and social media posts, which is more important? (%)



Perspectives on internet regulation (higher safety at the expense of freedom) by generation (%)



REGULATION

This outlook is underscored by the fact that LGBTQIA+ audiences are less inclined to support 'more regulation', with 50% endorsing the current level of regulation or favouring less, compared with 34% of non-LGBTQIA+ individuals. This view is especially prevalent among the younger generations within the LGBTQIA+ community.

These views arguably contribute to specific preferences for online brands, where there are variances across the community. YouTube emerges as a favorite online brand among bisexual women (44%), with its vast array of queer creators, artists, and opinion-holders fostering a sense of community. This platform also resonates with Baby Boomer LGBTQIA+ individuals (49%), highlighting its ability to cater to a diverse range of ages and interests. Over half (56%) of lesbians say they would recommend Amazon as their most popular online brand. Although WhatsApp did not rank in the top three brands for heterosexual males, gay males ranked it as their most recommended tech brand (43%).

> For brands, this presents a challenging opportunity to foster environments that encourage self-expression while simultaneously establishing mechanisms for safety against online threats.

Balancing these two factors can be a potent strategy for engaging with this audience effectively. Understanding and catering to these preferences should establish a valuable foothold in this tech-enabled demographic.

Online Brand Preferences by Group

Recommendation Hierarchy	#1		#2		#3	
Heterosexual Males	amazon	44%	YouTube	42%	Google	39%
Heterosexual Females	WhatsApp	44%	amazon	42%	Google	39%
Gay Males	WhatsApp	44%	YouTube	42%	amazon	39%
Lesbian Females	amazon	44%	WhatsApp	42%	Google	39%
Bisexual Males	amazon	44%	WhatsApp	42%	YouTube	39%
Bisexual Females	YouTube	44%	WhatsApp	42%	Google	39%

“The changing technological landscape means audiences are vastly becoming more digitally native. It’s not surprising to hear that the community is leaning towards digital environments with YouTube being the Brand of Choice. They have a rich and diverse collection of excellent LGBTQIA+ content hosted on YouTube, and continue to support queer artists through a variety of initiatives. In the future, I really hope to see even more inclusivity in our advertising and programming.”

Tashan Nicholas

LEADERSHIP COACH & ANALYTICS DIRECTOR

TRAVEL

Curious, Adventurous, & Careful with Money

Would you classify yourself as adventurous? 61% of LGBTQIA+ people would and 65% say that they are passionate about travel (54% non-LGBTQIA+), with greater interest in embracing different cultures, whether in the form of language learning (44% vs 34% non-LGBTQIA+) or experiencing off-the-beaten path experiences (55% vs 45% non-LGBTQIA+).

Travel is such an important dimension of life for LGBTQIA+ individuals that it ranks twice in their top three bucket list items: 1. Traveling to an exotic location (27%); 2. Marriage (25% vs 15% non-LGBTQIA+); and, 3. Visiting a natural wonder (24% vs 20% non-LGBTQIA+).

RECOMMENDATION PREFERENCES

When it comes to getting off the beaten track, Iceland, Sweden and Japan rank high as destinations the LGBTQIA+ traveller is more likely to recommend than their non-LGBTQIA+ counterparts. LGBTQIA+ people are less likely to recommend the USA, the United Kingdom, and Dubai. While we can only hypothesise, the context of the progressive and inclusive policies of the recommended destinations versus some recent and current events in the less likely to recommend destinations suggests that LGBTQIA+ travellers remain vigilant about safety when selecting travel destinations.

MORE LIKELY TO RECOMMEND

ICELAND
26% vs 16% non-LGBTQIA+

SWEDEN
21% vs 14% non-LGBTQIA+

JAPAN
19% vs 14% non-LGBTQIA+

LESS LIKELY TO RECOMMEND

USA
29% vs 29% non-LGBTQIA+

UK
33% vs 42% non-LGBTQIA+

UAE
7% vs 12% non-LGBTQIA+

"If I were to choose a brand favourite for travel, I would choose TfL, because, I mean, I know there's a lot of bad things about TfL but the fact that they actively have advertisements about hate crime and reporting hate crime and things like that makes me feel a lot safer travelling there."

LGBTQIA+ Focus Group Participant

TRAVEL BRANDS

Travel companies that outperform in the travel category include Booking.Com, with gay and lesbian audiences giving it a top rank in terms of recommendations (42%) when compared with the heterosexual audience (32%). Bisexual respondents on the other hand are most likely to recommend Tripadvisor (35% vs 17% non-LGBTQIA+).

Most Recommended Travel Companies (%)	LGBTQIA+	Non-LGBTQIA+
Booking.com	33	33
TUI	22	25
Tripadvisor	21	17
Jet2.com	17	25
easyJet.com	15	13

DUTY FREE

The LGBTQIA+ traveller is also more likely to shop at Duty Free, more likely to spend their extra cash at the airport, and generally more excited to spend money when traveling.

TRANSPORT

Equally, they are more considered when it comes to the planning elements of that travel, with the most important factor for choosing transport for a holiday being the cheapest prices for 47% (40% non-LGBTQIA+).

DESTINATION

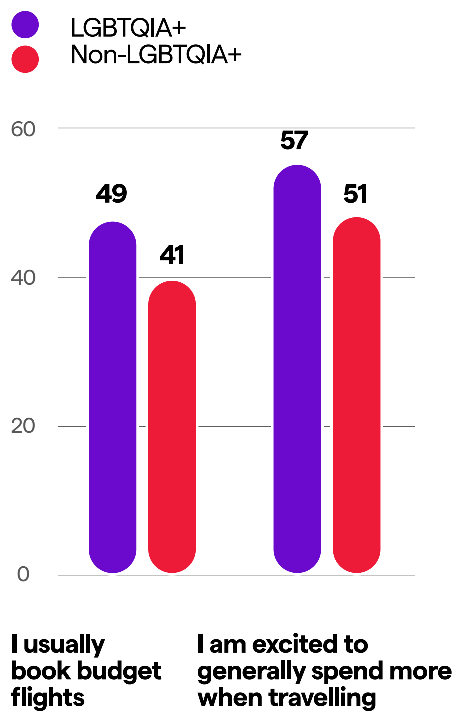
Alongside this, the audience is more likely to select a holiday destination based on low cost (e.g. cheap flights, hotels, activities, etc) (34% vs 26%). All of this contributes to a not-so-surprising brand finding.

A CONSIDERED BUYER

While the community has similar responses to their recommendations, with British Airways being the number one recommended airline and Virgin Atlantic number two, LGBTQIA+ people are more likely to recommend Ryanair - almost twice as likely, in fact!

Booking.com, Tripadvisor and easyJet holidays: what do these three brands have in common? These are platforms which allow for modern travel with convenience, providing extensive choice and high degrees of flexibility. Additionally, these tools provide budget-savvy travellers who seek cost-cutting and maximising their expenditures.

Perspectives on spending when traveling (%)



Most Recommended Airlines (%)	LGBTQIA+	Non-LGBTQIA+
British Airways	35	34
easyJet.com	21	21
virgin atlantic	21	24
Emirates	20	21
Ryanair	17	11

Thinking of running a campaign that features inclusive marketing for the community? Consider these top four holiday past-times:

Preferred activities for a holiday:

#1
44%
Visiting Museums, Galleries, Historic Buildings

#2
42%
Eating Well

#3
42%
Relaxing, Lazing Around

#4
39%
Visiting Natural Sites

Brands in this category have more cultural fluency by their nature, and are already creating great content; but, there's always room to grow and to 'usualise' identity with more nuance. Maybe that looks like a Tripadvisor ad featuring a bisexual woman on a city break in Iceland visiting the Perlan Museum...?

ENTERTAINMENT

Undisputed Stream Queens

If you're looking for recommendations, LGBTQIA+ people are likely to be the people who you go to for suggestions on new music/TV (32% vs 23%).

LGBTQIA+ consumers are at the forefront of multiformat entertainment, and ahead of the curve in some new forms of media and digital experiences; especially with stronger preferences for streaming, in-home experiences, and live events (award shows, etc.).

In all of these areas, they are over-indexing in everything from average time consuming streaming content, livestream viewing, and levels of interest in podcasts. Generally skewing younger, this is a cohort of early adapters, second screeners, and savvy streamers.

This is no doubt good news for digital-first services, but bad news for traditional outlets; including broadcast television and news outlets, where an underindex is apparent in formats from print to local/national TV. This is also evident in a pronounced openness to diverse sources, with nearly 58% of bisexuals and 54% of gay/lesbian audiences saying that they are not loyal to any one newspaper (vs. 46% non-LGBTQIA+). The LGBTQIA+ audience is equally discerning in their multiformat lifestyles. This includes an over-index in viewing movies more frequently month-over-month compared with their straight counterparts.

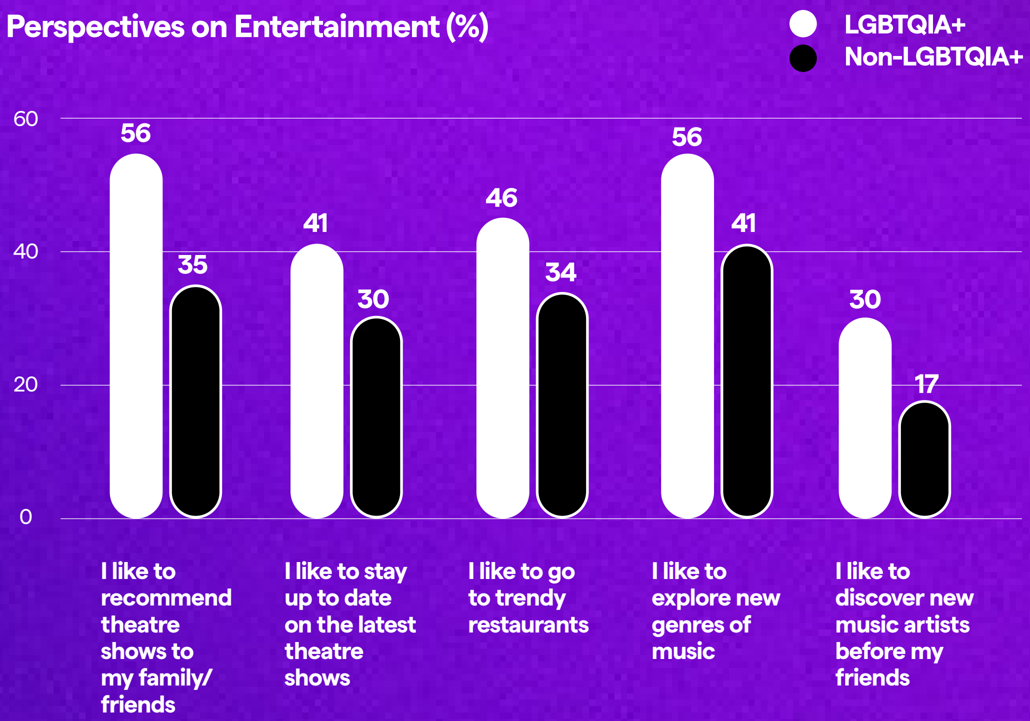
This audience is cutting the cable and embracing digital and virtual experiences. They are ready to engage with brand experiences that are immersive and multilayered. A potential pitfall? An emerging current of digital fatigue and overstimulation. With many indicating a sense of daily boredom, many LGBTQIA+ consumers say they subscribe to too many streaming services and providers.

The Culture Whisperers

Harkening to the song title from queer icon Charli XCX, the LGBTQIA+ is a community which wants to be Out OUT. From supporting local cinema to theatre exhibitions and musical artists, the LGBTQIA+community over-indexes when it comes to participation in the arts and entertainment industries.

As brand enablers and advocates, LGBTQIA+ respondents enjoy being culture whisperers as the first in the know when it comes to live music, exhibitions, cinema and new restaurants. Whether that is being the first to check out a trendy new restaurant, priding themselves in staying up to date on the latest theatre, or exploring new genres of music, the early-adopter mentality is strong in this category. LGBTQIA+ audiences are more likely to spend their time in museums, at concerts, at the cinema, theatres, and pubs and nightclubs, with strong variance with their non-LGBTQIA+ counterparts: art galleries (32% vs 21%), musicals (32% vs 21%), and trendy restaurants (46% vs 34%). However, it is not always about being out on the town. LGBTQIA+ audiences also gravitate toward entertainment and hosting in the home with an emphasis on fostering a more intimate sense of community.

Perspectives on Entertainment (%)



GAMING
The Golden Age of the Gamer

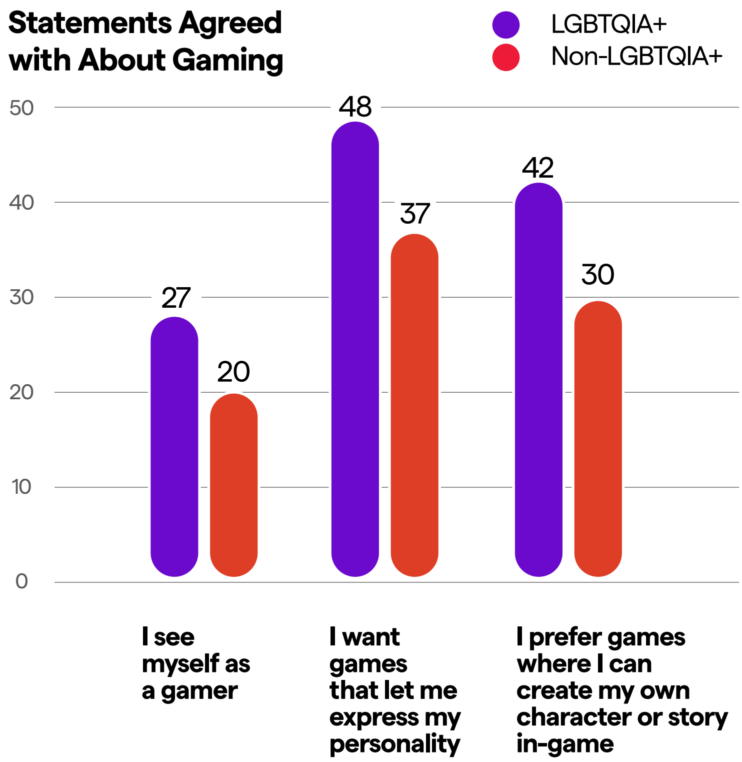
Gaming has become embedded in the LGBTQIA+ community. To start, there is a slight preference amongst gay, lesbian and bisexual people to play games while watching TV. This is yet another manifestation of an always-on lifestyle and a general aptitude for digital experiences.

You may have heard of the 'gaymer' movement - a subset of the queer community that is gaining traction and momentum, not just across the larger community, but within culture at large.

LGBTQIA+ gamers over-index on being hardcore or core/mid gamers; and, they are significantly less likely than their non-LGBTQIA+ counterparts to be non-gamers. For many, the world of gaming has become a safe space of self-expression that allows for individuals to engage in both fantasy and possibility, while also fostering real connections with a broader community

The most popular games? The Sims take the cake (and the pool, and the bed, and the forbidden words)!

Rank	Game	LGBTQIA+ %	Non-LGBTQIA+ %
#1	The Sims	42	19
#2	Super Mario	41	31
#3	Pokémon	33	19
#4	Minecraft	30	19
#5	Grand Theft Auto	28	21



SELF-EXPRESSION

Not only are 'gaymers' more likely to want to play games that help them express their identity and personality, they are also more likely to play games where they can create their own character (+12%), and more likely to identify as gamers (+7%). They also have more enthusiasm for games across formats, including video games (41% vs 30%), mobile applications (41% vs 31%) and on (mobile) devices (39% vs 31%).

Can You Be Gay in the Sims? Source: Gayming Mag

“Gaming isn’t just a beloved hobby or passion of the LGBTQIA+ community, it’s become a leading safe space for self curation and exploration. This is a community who has become a leading force in the gaming conversation, and a core demographic that is shaping the conversations around trending games. It’s also a zone of evolving self expression and experimentation, where they can shift and shape their own narratives.”

Yusif Ali
GAYMERS INC.

ALCOHOL
Social Spirits

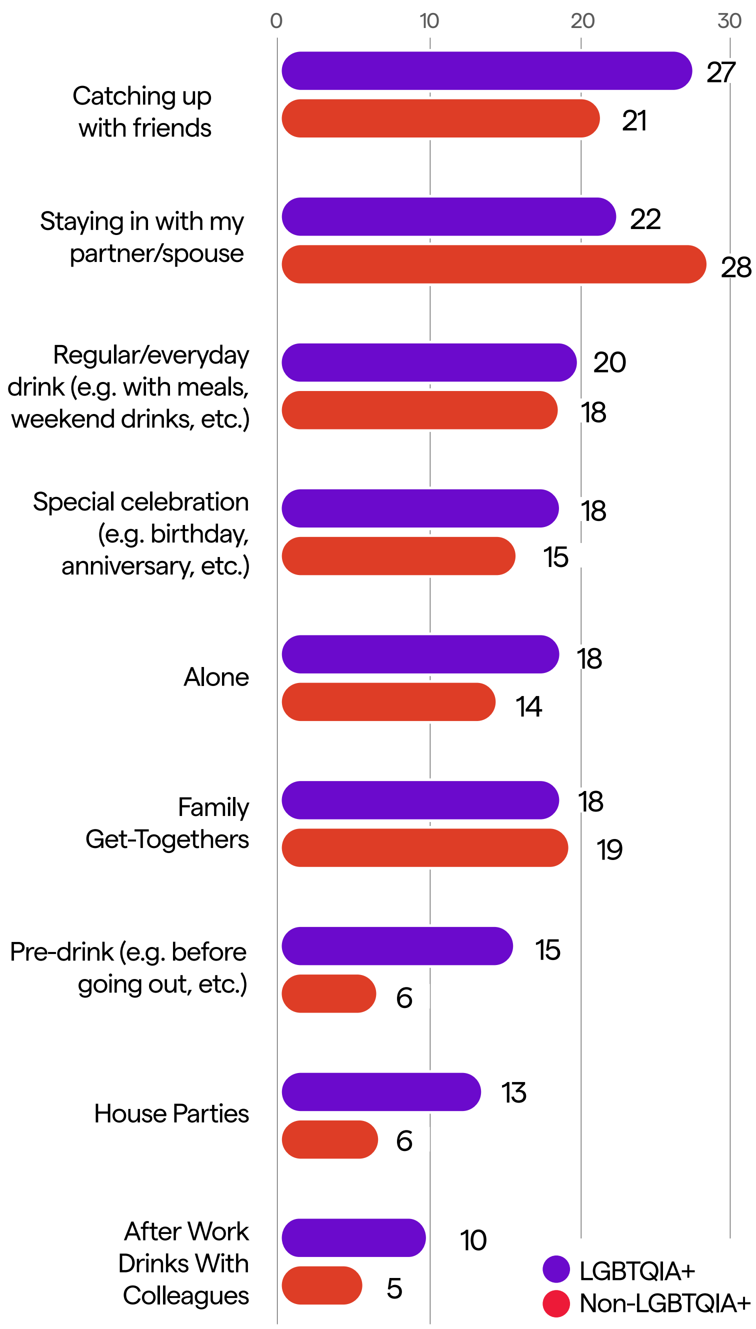
With 67% admitting that they 'have been known to dance around when no one is watching', LGBTQIA+ people enjoy letting loose once in a while.

Although a rising number of consumers in the UK are turning away from alcoholic drinks, with 1 out of 4 LGBTQIA+ and the same number of non-LGBTQIA+ respondents saying they do not consume alcohol, the LGBTQIA+ community continue to enjoy going to the pub for a drink (64% vs 59%). In fact, our LGBTQIA+ audience over-index on occasions for drinking alcohol in all instances other than when getting together with family.

SOCIAL DYNAMICS

Drinks have a more social aspect when bought from the shops as well: the top occasion for LGBTQIA+ people to buy alcohol is to catch up with friends, with 1 out of 4 having done so within the last four weeks (vs 1 out of 5 non-LGBTQIA+). In contrast, for non-LGBTQIA+ drinkers, the primary intention is to stay in with a partner or spouse (28% vs 22% LGBTQIA+). LGBTQIA+ consumers are also more than twice as likely to be drinking alcohol at a house party (13% vs 6%) or after work drinks with colleagues (10% vs 5%) than their non-LGBTQIA+ counterparts.

Occasions for drinking alcohol purchased from shops in the last 4 weeks %



WHAT ARE THEY DRINKING?

Nearly half of LGBTQIA+ people prefer spirits to beer or wine, compared with 1 out of 3 non-LGBTQIA+. Still, lager tops the list of favourite alcoholic beverages for both LGBTQIA+ and non-LGBTQIA+ consumers overall.

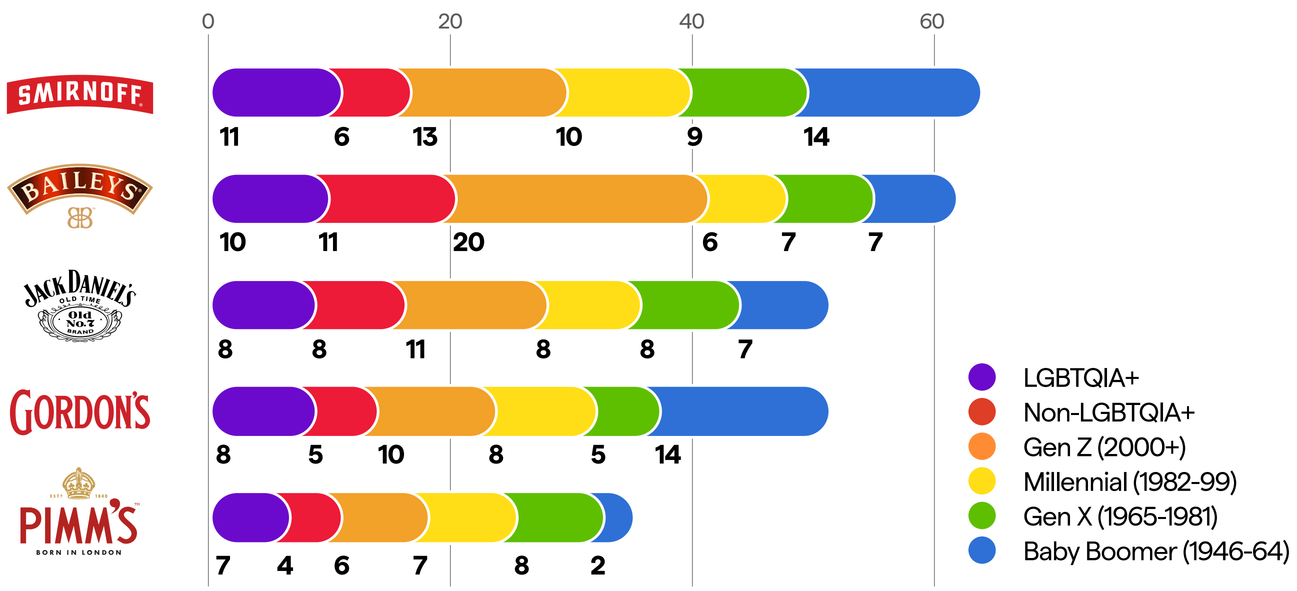
SMIRNOFF ON TOP

Smirnoff comes out on top of the alcohol purchased by LGBTQIA+ consumers, who are twice as likely to have bought it in the last 30 days than non-LGBTQIA+. Gen Z LGBTQIA+ stand out as the brand's strongest consumer cohort. Smirnoff benefits from increased ad awareness amongst LGBTQIA+ consumers. Moreover, word of mouth for the brand is strong, with one in ten LGBTQIA+ people having talked about it with friends or family in the last two weeks. Additionally, 1 in 10 LGBGTQIA+ people say they have recently heard something good about the brand – whether from advertising, media or from personal networks (2x as likely as non-LGBTQIA+).

SMIRNOFF

The brand benefits from its long-standing advocacy of gay rights and its inclusive advertising, actively speaking to and championing the community.

Over the past two weeks, which following alcoholic beverage brand have you heard something positive about? LGBTQIA+ community by age group. (%)



SUPERMARKET SWEEP
- Diverse Tastes

Given that the LGBTQIA+ cohort skews younger, more urban, and less likely to drive, you may expect them to forgo the supermarket shop for online orders. Though LGBTQIA+ people are indeed somewhat less likely to supermarket shop; in truth, the major supermarkets still dominate grocery shopping for all shoppers (77% LGBTQIA+ vs 83% non-LGBTQIA+).

This could be set to change, though, once consumers feel that the online offering catches up. LGBTQIA+ people are after all more likely to say 'If I could get all I need delivered from ordering online, I would never go in-store for my shopping' (39% vs 33% non-LGBTQIA+).

Online grocery services, recipe boxes, or other food delivery services have permission to find new ways to connect with LGBTQIA+ shoppers as the shift to online deepens. As we will show below, this shift will also require guaranteeing cost-effectiveness and environmental sensibilities for it to truly take hold.

> When speaking to the LGBTQIA+ community, it is important to remember that while common attitudes and preferences can and do exist, it is far from a monolith. A diverse set of preferences intersect with specific genders and sexual identities.

Add to this mix matters of taste, function, cost, and values, the top ranked brands within the food and beverage category showcase a real diversity.

Let's look at the most recommended snack brands across some of the different cohorts as an example . It's interesting to note that Pringles are more recommended than Walkers by LGBTQIA+ respondents overall (42% vs 34% non-LGBTQIA+) and as illustrated this extends across Gay Males, Lesbians, Bisexual Males and Bisexual Females. An overall over-index exists for Ben & Jerry's (38% of LGBTQIA+ would recommend vs 29%) and Oreo (35% vs 22%) amongst LGBTQIA+ consumers, which could be explained by their consistent and visible support for issues that are important to the community.

Most Recommended Snack Brands	#1		#2		#3	
All UK	WALKERS	44%	McVitie's Digestives CHOCOLATE	42%	PRINGLES	39%
Gay Males	PRINGLES	44%	McVitie's Jaffa Cakes	42%	BEN & JERRY'S	39%
Lesbian Females	McVitie's Jaffa Cakes	44%	McVitie's Digestives CHOCOLATE	42%	HULA HOOPS	39%
Bisexual Males	PRINGLES	44%	BEN & JERRY'S	42%	WALKERS	39%
Bisexual Females	OREO	44%	BEN & JERRY'S	42%	McVitie's Jaffa Cakes	39%
Heterosexual Males	WALKERS	44%	McVitie's Digestives CHOCOLATE	42%	PRINGLES	39%
Heterosexual Females	WALKERS	44%	McVitie's Digestives CHOCOLATE	42%	PRINGLES	39%

Looking at where things diverge, while Ben & Jerry's is the second most recommended brand by Bisexual Females, it doesn't feature in the top five for Lesbians. Oreos meanwhile stand out as by far the most recommended for Bisexual Females. Not only that but Bisexual Females are significantly more likely to recommend their top 3 favourite snacks when compared with other segments of the population. The reasons behind these variances are divergent, but more importantly this illustrates that brands can't assume that the LGBTQIA+ community will respond uniformly to their marketing. Further, it is an invitation to explore building campaigns that resonate where brand allegiances already live.

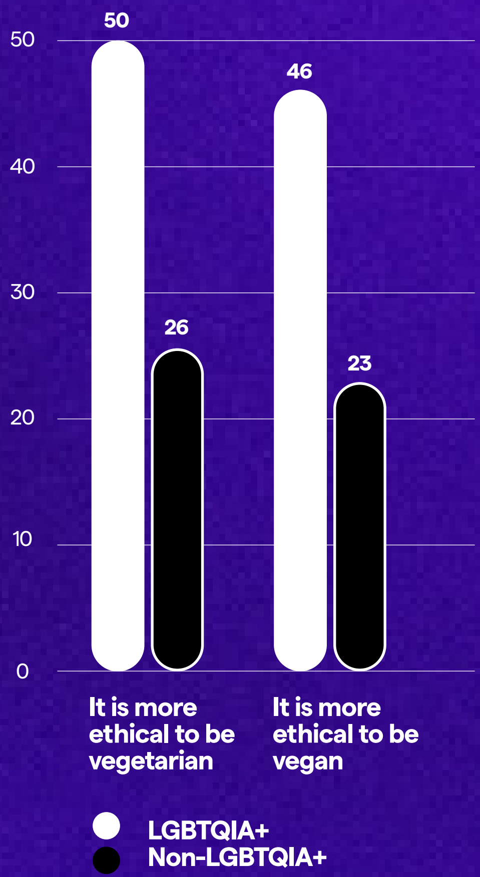
POP THE QUESTION

If you want to know more about someone, ask them about their favourite carbonated drinks. They might call them "fizzy drinks", "pop", "soda" or "mineral" or another term, depending where they are in the UK. Regardless of what they call it, brand preferences vary across lesbian, gay and bisexual cohorts. Lesbians are more likely to recommend Fanta, their most recommended brand, than the national average (44% vs 31%). Gay Males meanwhile are more likely to recommend Dr Pepper, Coca-Cola Zero or Fever-Tree (joint top ranked at 30%), while Bisexual Males prefer Tango (34% recommend vs 18% national average).

Most Recommended Snack Brands

Heterosexual Males	Heterosexual Females	Gay Males	Lesbian Females	Bisexual Males	Bisexual Females
Coca-Cola	pepsi MAX	Dr Pepper Est. 1885	FANTA	Tango	FANTA
38%	27%	30%	44%	34%	34%

Perspectives on Plant-Based Diets %



CONVENIENCE IS KEY

The data suggests that LGBTQIA+ shoppers prioritise convenience more than most, with 45% of LGBTQIA+ people saying that 'it's more convenient to eat on the go than to sit down for a traditional meal' (29% non-LGBTQIA+). One in three LGBTQIA+ people 'usually order in or get takeaways', compared with one in four non-LGBTQIA+. This could be explained by a fast-paced lifestyle, with 1/3 LGBTQIA+ people saying that 'my lifestyle doesn't allow me time to prepare and cook food', vs 1 in 4 non-LGBTQIA+.

When they do prepare food, LGBTQIA+ people are more likely to consider the time it takes to prepare or acquire it (51% vs 42% non-LGBTQIA+). And 24% of LGBTQIA+ people also consider the complexity of the recipe, compared with 13% non-LGBTQIA+. Brands seen to provide more convenience and less hassle, or to identify with the fast-paced lifestyle of this audience, could stand to benefit when addressing LGBTQIA+ shoppers.

PLANT-BASED PIONEERS

The most marked difference in food preferences between LGBTQIA+ consumers and their non-LGBTQIA+ peers, however, relates to meat and animal derived products. Half of LGBTQIA+ individuals believe that it is more ethical to be vegetarian than not (26% non-LGBTQIA+). Similar levels of agreement can be seen towards veganism, where the rate of LGBTQIA+ agreement is double that of non-LGBTQIA+ respondents.

The reasons for this dietary shift are, in the first instance, altruistic in nature. The top ranked factor that LGBTQIA+ people claim encourages them to adopt a vegan/vegetarian diet is environmental (30%), followed closely by concerns over animal welfare (28%) and general health reasons (25%). Nearly 2 in 5 of LGBTQIA+ people (38%) believe that a meatless diet is the healthier option. Additionally, 1 in 4 list "wanting to eat more cheaply" as a reason for their adoption of a vegan or vegetarian diet (16% non-LGBTQIA+).

> Brands that are seen to be reducing their environmental impact and improving animal welfare will be rewarded by LGBTQIA+ consumers

This could include the introduction of plant-based alternatives and increased representation of vegan and vegetarian LGBTQIA+ lifestyles. Casting an ad or seeking your next influencer? Why not consider one of the many well-known vegan LGBTQIA+ celebrities such as Elliot Page, Alan Cumming or Ruby Rose?

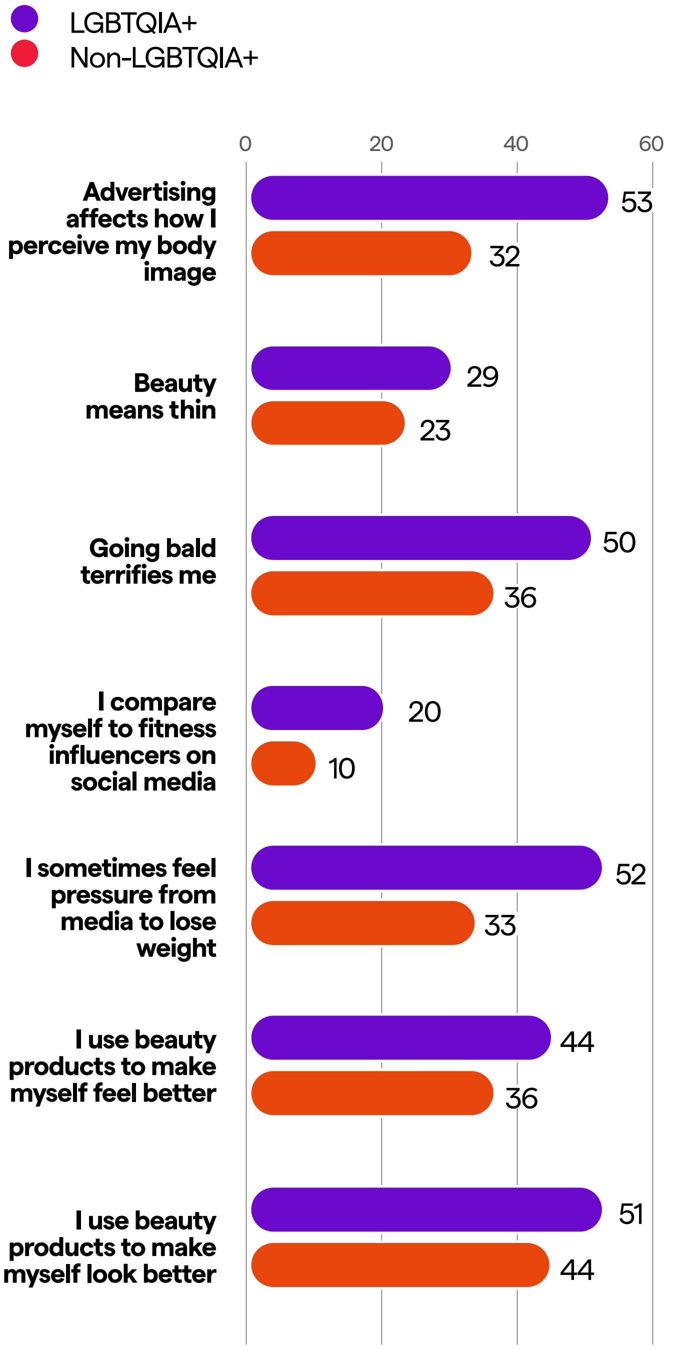
HEALTH + BEAUTY

Setting a New Standard

While true of all audiences, health and beauty brands should take special care when talking to LGBTQIA+ audiences, as only 25% of LGBTQIA+ people are fairly or very happy with their body image, compared with 31% non-LGBTQIA+. As might be expected, women score lower than men across all sexual identities. More than half of lesbians (52%) and bisexual women (57%) are 'not very happy' or 'not very happy at all' with their body image.

> Advertising is largely recognised as a factor behind how they feel. **More than half of LGBTQIA+ people** claim that advertising affects how they perceive their body image, compared with just 1 in 3 non-LGBTQIA+.

Statements Agreed with About Health + Beauty



Young people are especially susceptible, with 2/3 of LGBTQIA+ Gen Z consumers agreeing. Weight loss also vexes many in the community, with LGBTQIA+ people as a whole more likely to 'sometimes feel pressure from media to lose weight' (52% vs 33%).

These factors provide some indication as to why 44% of LGBTQIA+ people use beauty products to feel better, against 36% non-LGBTQIA+.

Beyond standards of beauty, Health & Beauty category dynamics are increasingly informed by the issues of animal welfare and sustainability, with 2 in 5 LGBTQIA+ shoppers motivated by whether the products are cruelty-free and not tested on animals (vs. 27% non-LGBTQIA+. Sustainability (21%) is a motivation for 1 in 5 LGBTQIA+ shoppers (vs 11% non-LGBTQIA+). These concerns may be why LGBTQIA+ people are 24% more likely to recommend the cosmetics store Lush, known for its anti-cruelty and sustainability initiatives.

Another notable stand-out in the category is Kiehl's. Despite being dwarfed in the UK by high street giants Boots and Superdrug, Kiehl's is more than twice as likely to be recommended by LGBTQIA+ people than others. Kiehl's has a long history of supporting LGBTQIA+ causes including HIV/AIDS research and LGBTQIA+ young people charities.

Brands that show they share the values of their LGBTQIA+ consumers stand to be rewarded. LGBTQIA+ people are more than twice as likely than others to be motivated to choose a make-up or personal care brand because their marketing shares their values, with 10% citing this as an important factor.

Health & Beauty brands need to act responsibly, and consider their impact on all consumers. This extends to how health and beauty standards are defined by brands. Advertisers must rise to the challenge to set new standards of health and beauty, incorporating all forms of LGBTQIA+ beauty and rooted in the wellbeing of audiences as a whole, including self-image.

Factors Encouraging a Vegan Diet
LGBTQIA+ vs Non-LGBTQIA+

#1
30% vs 17%
Environmental Concerns

#2
28% vs 21%
Concerns over Animal Welfare

#3
Both 25%
General Health Reasons

#4
23% vs 16%
Wanting to eat more cheaply

"The fact that there's a significant over-index in the LGBTQIA+ community when it comes to brand allegiance with Lush is wonderful news. We believe ethical practices should be business as usual, and we love the fact that our values align with our consumers'. As a brand built on word of mouth and recommendations, this community being 24% more likely to recommend is huge... and we will continue to use our platforms to stand up for and stand beside the LGBTQIA+ community, and to promote values like sustainability and anti-cruelty in our practices."

Kalem Brinkworth
SENIOR CREATIVE, LUSH

LGBTQIA+ & SPORT
A Tough Field

The world of sport has long presented a complicated proposition and playing field for the LGBTQIA+ community.

Encouragingly there is strong interest for sports to become more inclusive, with 70% of both LGBTQIA+ fans and their non-LGBTQIA+ peers sharing this view.

While overtures from major associations have been made in recent years, such as the Premier League's recent Rainbow Laces campaign, aversion and apathy still persists. With media reports on things like homophobic slurs, the failure of the World Cup to provide a safe environment for LGBTQIA+ fans, and more, sport clubs are at times a fraught place for LGBTQIA+ fans.

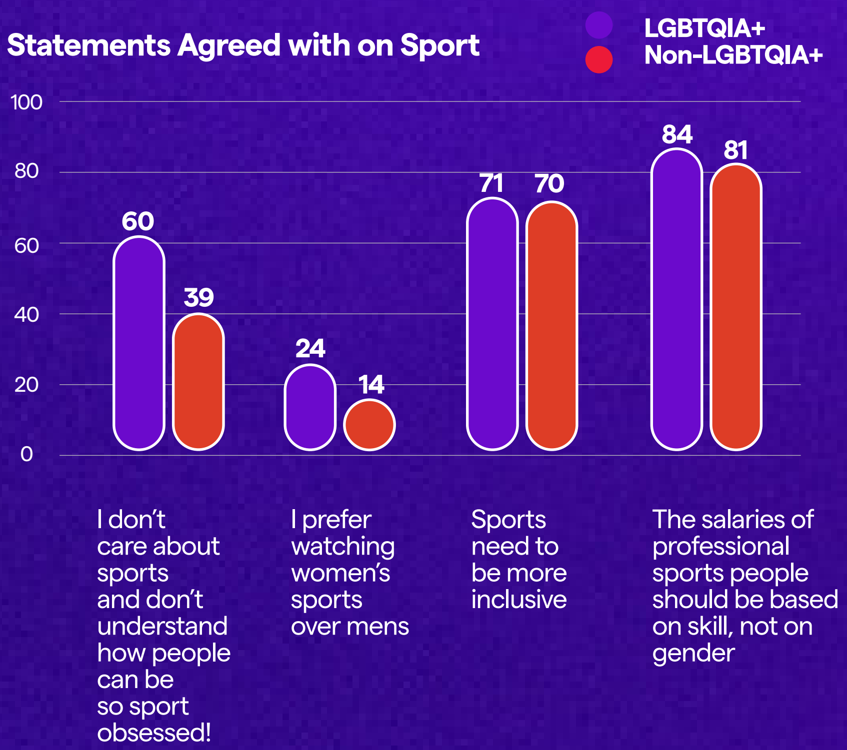
Where 60% of LGBTQIA+ respondents agreed with the statement "I don't care about sports and don't understand how people can be so sport obsessed!", that number drops drastically to 39% for the non-LGBTQIA+ population, who also indicate a stronger likelihood of relating to 'sport obsessions'. In fact, 41% of heterosexual males say that they can't go through their day without checking up on the day's sporting events (vs 20% LGBTQIA+).

Similarly there is unity amongst sports fans that the salaries of professional sports people should be based on skill instead of gender (84% LGBTQIA+ vs 81%). Finally, 24% of LGBTQIA+ people said they preferred to watch women's sports over men's (vs 14% non-LGBTQIA+).

"Overall, of which of the following sporting events/leagues do you have a positive impression?"

Recommendation Hierarchy	#1	#2	#3
Heterosexual Males	English Premier League 33%	England's Women's Football Team 30%	Commonwealth Games 29%
Gay or Lesbian	Commonwealth Games 27%	England Rugby 24%	England's Women's Football Team 23%
Bisexuals	England's Women's Football Team 32%	Commonwealth Games 24%	English Premier League 23%

The outlook for LGBTQIA+ fans and the world of sport shows some promise with advocacy for women's sport and the corresponding representation and equal rights for female athletes alongside their male counterparts.



AUTOMOTIVE

Pre-Loved Vehicles Trump New Ones for LGBTQIA+ Audiences

The automotive industry is challenging because the most likely actions that the LGBTQIA+ may take in the next 12 months is to do nothing (70%), or buy a pre-owned or used car (17%).

On the whole, the community is less likely to own a car than the non-LGBTQIA+ population, with a substantial 56% not owning vehicles (vs 28% for non-LGBTQIA+). The low levels of current ownership, as well as intent to own, in the category are due to a confluence of factors.

Firstly, the expense associated with car ownership is seen as a significant barrier, with 75% of the LGBTQIA+ community acknowledging financial constraint. Additionally, there is a rejection of car culture in light of environmental concerns which for many is also a reason to search for alternative modes of transportation. Car ownership is also a commitment that half of all LGBTQIA+ cannot envision for themselves (vs 29% non-LGBTQIA+).

LGBTQIA+ individuals in the UK share some of the same brand preferences as their non-LGBTQIA+ peers, with Ford, Volkswagen, and Audi ranking amongst the most recommended brands. However, the LGBTQIA+ community also has a strong affinity for a few specific brands.

BMW and MINI are particularly well-regarded among gay males. One in four gay males (23%) are likely to recommend these brands to a friend or colleague, compared with just 11% of heterosexual males. Moreover, 32% of gay males say they would be proud to work at MINI or BMW, nearly twice the rate of heterosexual males (18%). LGBTQIA+ millennials also have a positive view of MINI, with 33% saying they would be proud to call it their workplace. Meanwhile, lesbians rank Nissan and Hyundai among their most recommended brands.

YOUTUBE, RENAULT CLIO - 30 YEARS IN THE MAKING (2019)

This slump in automotive preferences in the LGBTQIA+ community is in spite of some brilliant recent marketing featuring queer people, including Renault Clio’s ‘30 Years in the Making’ advertisement from 2019. That advertisement featured a lesbian couple who are also the most likely to own a passenger car, with a substantial 52% ownership, making them the frontrunners in this category. The data also illuminates the fact that having a vehicle suitable for family needs resonates strongly with the bisexual and lesbian communities within the LGBTQIA+ spectrum.

Automotive brands have challenges unique to their sector. Innovative brands can develop flexible car ownership models that promote more environmentally conscious options and competitive pricing structures.

For brands seeking to connect with LGBTQIA+ consumers, there is an opportunity to tap into the values and needs tied to understanding generational shifts, gender dynamics, and geographical trends that can provide a solid foundation for tailoring marketing strategies to resonate with this vibrant and diverse community.

> **One of the things that I would say to an audience is actually being Trans+ is one of the least interesting things about me. So many parts of the media, so many parts of advertising treat us like our LGBTQIA+ identity is the sum of our identity.**
>
> **We're all intersectional beings! We've all got this vast experience. I'm a forces veteran and I'm a parent. I've worked with mental health and suicide. All these things are much more interesting. So yeah, just just get over it.**

Serena

TQIA+ FOCUS GROUP PARTICIPANT, ENGLAND

CONCLUSION

This report provides a relatively brief but rich portrait of the LGBTQIA+ community and their attitudes towards brands, advertising, marketing, and media.

This is a picture painted of a moment in time. As our focus group participant Serena so eloquently stated, identity is an intersectional dynamic, with attitudes, experiences, and intentions being shaped by this dynamism. Brand preferences are ever-evolving throughout the community, and are in conversation with social, political and economic trends and changes globally.

This report provides a snapshot of a range of commercial sectors where the opportunities to connect with the LGBTQIA+ community and their friends, families, and allies are infinite. Some of the sectors covered in this report benefit from high interest and engagement, yet not all brands in the category are keeping pace with the dynamics of culture. Other sectors in this report are burdened with a legacy of non-inclusive and in some cases harmful behaviours; brands in these sectors sometimes do not know where to get started. This report and its suggestions, as well as the broader Outvertising community, are built to support brands across this spectrum.

As the LGBTQIA+ advocacy and inclusion group in the Marketing and Advertising space in the UK, we are uniquely placed to care both about our community and about how brands can better engage. This means showing a long-term commitment to supporting a community that is, unfortunately, still actively under attack.[6] We created the Outvertising Guide as a tool for brands on how to create LGBTQIA+ inclusive advertising.[7]

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[6] IPSO published research from 2009 to 2019 that showed a 400% increase in coverage reporting volume of Trans+ 'issues' within the sample publications over the past five years, with the number of negative reports skyrocketing and IPSO stating that "most notable has been the rise in the proportion of transgender-related stories published by the tabloid press."

[7] Read the full report here: https://static1.squarespace.com/static/5d1c96cfbf0ff90001f3c55c/t/5eaf10ea0d119810f626116c/1588531466410/Outvertising_Report_2020.pdf/

This report expands upon that guidance and reminds brands, businesses and leaders:

Don’t fall into stereotypes

enjoy the truisms and insights, but don’t underestimate the nuances the community holds within it.

It’s not all ‘love is love’; sit in the community’s pain

we have to move beyond toxic positivity as being enough. Love is love, but money talks and as an industry we need to be creating work that changes the playing field for the better as a standard.

Consider heteronormativity

are you just replacing non-LGBTQIA+ individuals with LGBTQIA+ individuals to improve your representational politics? If the answer is yes, deeper engagement with the lived experiences of LGBTQIA+ individuals is needed.

Scratch beneath the surface

enjoy the data, but use it as a jumping off point to look at deeper meaning. add qual to your quant - community insight is key to authenticity.

Consider your brand’s long-term mission

and be ready to put the long-term work in to gain the trust of the LGBTQIA+ community if you are weaving engagement with us into your activities.

Create a social media policy and be prepared to answer questions

preparing to face backlash and standing by your position is key when creating work that represents our community, unfortunately.

Stick to your principles and return to them frequently

be confident in your decision making. If you do the foundational work, and stay true to your values and principles, success will follow.

Tend to your work and ensure it updates with the world

nothing is static. Language, attitudes, perceptions, culture and how to show up need to adapt as time passes - stay aware of what’s happening in the world and in the community.

Thank You

A sincere thanks to all who were involved in this project. Outvertising is a 100% volunteer run organisation, which means that this report was a labour of love across many talented folks in our community.

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