Nielsen

The push for change:

Examining LGBTQ+ representation in media and advertising

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Foreword

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The trend toward increasing LGBTQ+ representation in media reflects forward progress for the community, but the road ahead is far from smooth. As recent cancellations and shortened series disproportionately affect queer representation on screen, finding LGBTQ+ inclusive content to help carry inclusive brand messaging may prove even more challenging.

No matter if it is in government, television, or social media campaigns, diverse communities want more representation, not less. Brands have a unique opportunity to speak directly to and in support of historically excluded populations.

Nielsen research shows that 42% of U.S. adults say it makes them more likely to buy from a brand when they are represented in a campaign[1]. Helping brands discover new client segments and effectively connect with them takes commitment from the brand and the right insights about the community.

One story, one conversation can help to inform and change us. It's why LGBTQ+ representation must continue. And it's why Nielsen is committed to powering a better media future for all.

Editor's notes: LGBTQ+ is used in this report to reference people who identify as lesbian, gay, bisexual, transgender, queer, intersex or asexual. Cisgender refers to people whose gender identity corresponds with the sex they were assigned at birth. Non-cisgender identifying refers to people who do not follow other people's ideas about how they should look or act based on the female or male sex they were assigned at birth.

Our survey, powered by Dynata, across nine countries, incorporated nearly 5,500 respondents from a variety of sexual orientations, gender identities, gender expressions and sex characteristics. In some instances, LGBTQ is used in reference to respondents that experience sexual attraction—including respondents that are lesbian, gay, bisexual or pansexual, transgender and additional queer identities.

[1] Nielsen Attitudes on Representation on TV Study, 2022

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Introduction

The voice of the global LGBTQ+ community has never been louder, but the same can be said about the opposition to it. Aside from major changes in laws and norms pertaining to people who identify as LGBTQ+, perceptions and acceptance vary widely around the globe, and aversion, discrimination and bigotry are very real. It is within this space that media can play one of two roles: It can help educate, but it can also act as an accelerant.

With many divided opinions, the intensity of different viewpoints has spread well beyond social stigma in some cases. While anti-LGBTQ+ laws aren't new, many countries are building on existing legislation by criminalizing LGBTQ+ activities, and others are imposing restrictions on health care.

Global human rights organization Human Rights Watch notes that at least 67 countries have national laws criminalizing same-sex relations between consenting adults. Human Rights Watch also notes at least nine countries with national laws that criminalize forms of gender expression that target transgender and non-cisgender identifying people.

In March of this year, Uganda passed a bill that criminalizes people who identify as LGBTQ. The law prescribes punishments as severe as the death penalty for certain crimes.

In the U.S., the Trans Legislation Tracker had identified 555 anti-trans bills introduced across 49 states in 2023 as of May: 78 had passed; 373 were active; 104 failed. Of note, Tennessee passed a law in March banning transgender youth from receiving gender-affirming care.

Away from public policy, many brands understand the value of engaging with diverse consumer groups, and they're actively developing personalized messages to do so, including extending those for the LGBTQ+ community. And while marketing campaigns involving same-sex couples have become somewhat common, particularly in developed countries, the same can't be said for gender expression.

A major U.S. beer brand, for example, recently faced significant consumer backlash after enlisting a well-known transgender influencer for a specially curated social media campaign originally targeted to the influencer's followers. However, with more than half of U.S. adults spending an hour or more on social media every day[2], the borderless and rapidly evolving media landscape makes it impossible to limit who does and who doesn't see something.

For the beer brand, the fallout included viral re-posts of the original post mixed with anti-brand sentiment from some celebrities and politicians, apparent backpedaling by the brand, steadily intensifying calls to boycott, and ultimately, an entirely new marketing plan.

Media is where everything plays out. The good. The bad. And everything in between. Importantly, ad delivery is different from ad exposure. And while data and technology can help marketers identify audiences and engage with them, brands can't control how audiences share their messages. That's where brand integrity comes into play.

Americans are 2X more likely to use a brand that demonstrates a public commitment to LGBTQ rights

Source: 2022 GLAAD-Edelman study

A number of well-known brands, for example, have been praised for upholding their positions on transgender inclusivity, including Victoria's Secret this past March, and a December 2022 GLAAD-Edelman report found that Americans are two times more likely to use a brand that demonstrates a public commitment to expanding and protecting LGBTQ rights. Brand purpose will always need steadfast support for long-term gains, particularly when there is pushback.

[2] Nielsen Scarborough USA+, 2022 Release 2

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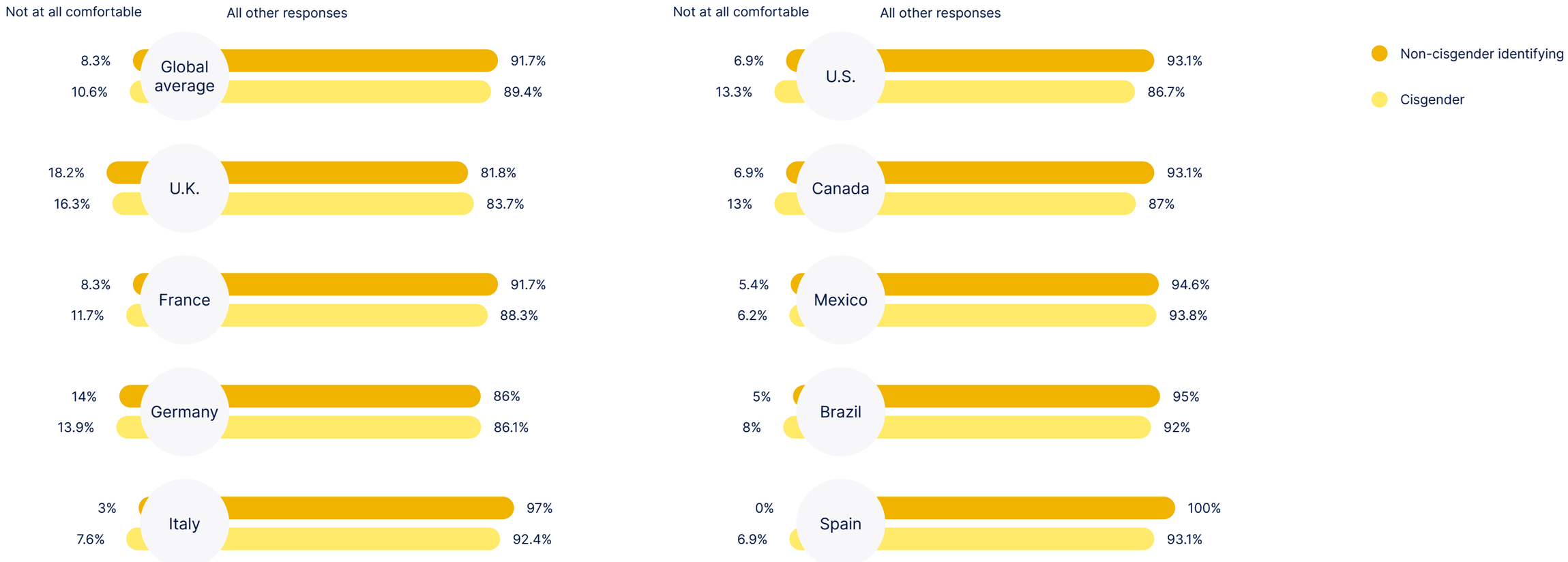
Non-cisgender identifying audiences welcome brand engagement

The future of marketing is personal, and audience data is critical in an era where people are looking for content—and brands—they can connect with. And within the LGBTQ+ community, Nielsen's 2022 international LGBTQ+ inclusive media perceptions study found non-cisgender identifying audiences[3] are generally receptive to brand engagement. In fact, they're more comfortable with brands targeting them based on their sexual orientation and/or gender identity than cisgender[4] audiences. Comfort among this group is highest in Spain, while comfort is much lower in the U.K. and Germany.

Comfort with brand targeting based on sexual orientation and/or gender identity

Among cisgender and gender nonconforming audiences



Read as: 18.2% of non-cisgender identifying audiences in the U.K. are not at all comfortable with brands targeting them based on sexual identity.

Note: The data for this chart reflects comfort levels across a 10-point scale. The data for "all other responses" reflects aggregated responses to all responses other than "not at all comfortable."
Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study.

[3] Non-cisgender identifying refers to people who do not follow other people's ideas about how they should look or act based on the female or male sex they were assigned at birth.
[4] Cisgender refers to people whose gender identity corresponds with the sex they were assigned at birth.

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Brands can drive greater engagement with non-cisgender identifying people

Despite the receptiveness of non-cisgender identifying audiences to targeted ads, data from our study suggests that brands have more of an engagement opportunity than they're acting on. Among those surveyed, only 26.4% of non-cisgender identifying audiences say they've received targeted ads. The majority (62.7%), on average globally, say they haven't been targeted (11% said they couldn't recall). Among the broader LGBTQ+ community, only 19% say they've received targeted advertising. With many divided opinions, the intensity of different viewpoints has spread well beyond social stigma in some cases. While anti-LGBTQ+ laws aren't new, many countries are building on existing legislations by criminalizing LGBTQ+ activities, and others are imposing restrictions on health care.

To the credit of brands, 63.9% of non-cisgender identifying audiences say products and messaging within ads targeted based on sexual orientation and/or gender identity were relevant. That's notably higher than the 46.4% of cisgender people and 48.9% of the LGBTQ+ community at large who say targeted ads have been relevant with both product and messaging.

Relevance among non-cisgender identifying audiences is highest in Mexico, where 91.7% say both the product and messaging were relevant to them. Perceived relevance is lowest in the U.K., where only 41.2% of non-cisgender identifying audiences say both the product and messaging were relevant to them.

Brands can increase relevance of ads targeting LGBTQ+ people

48.9%
say targeted ads feature relevant products and messaging

Product and messaging relevance is

91.7%
Highest in Mexico

41.2%
Lowest in U.K.

Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study.

LGBTQ+ inclusive activations win with the community

Gucci
Featuring actress Julia Garner, actor Elliot Page and musician A$AP Rocky, Gucci's latest Guilty perfume campaign is "an ode to self-acceptance, friendship, and love in all its forms. The campaign invites each of us 'home,' a metaphorical place where we are free to accept who we are and let our authentic selves be seen."

LEGO®
In 2022, LEGO built on its Everyone is Awesome stance with its '*A-Z of Awesome*' campaign that runs through 2023. Rooted in the company's brand values, the campaign features LEGO builds to celebrate inclusivity and embrace self-expression in the LGBTQIA+ community. It also leverages the music theme from the brand's *Everything is Awesome* movie.

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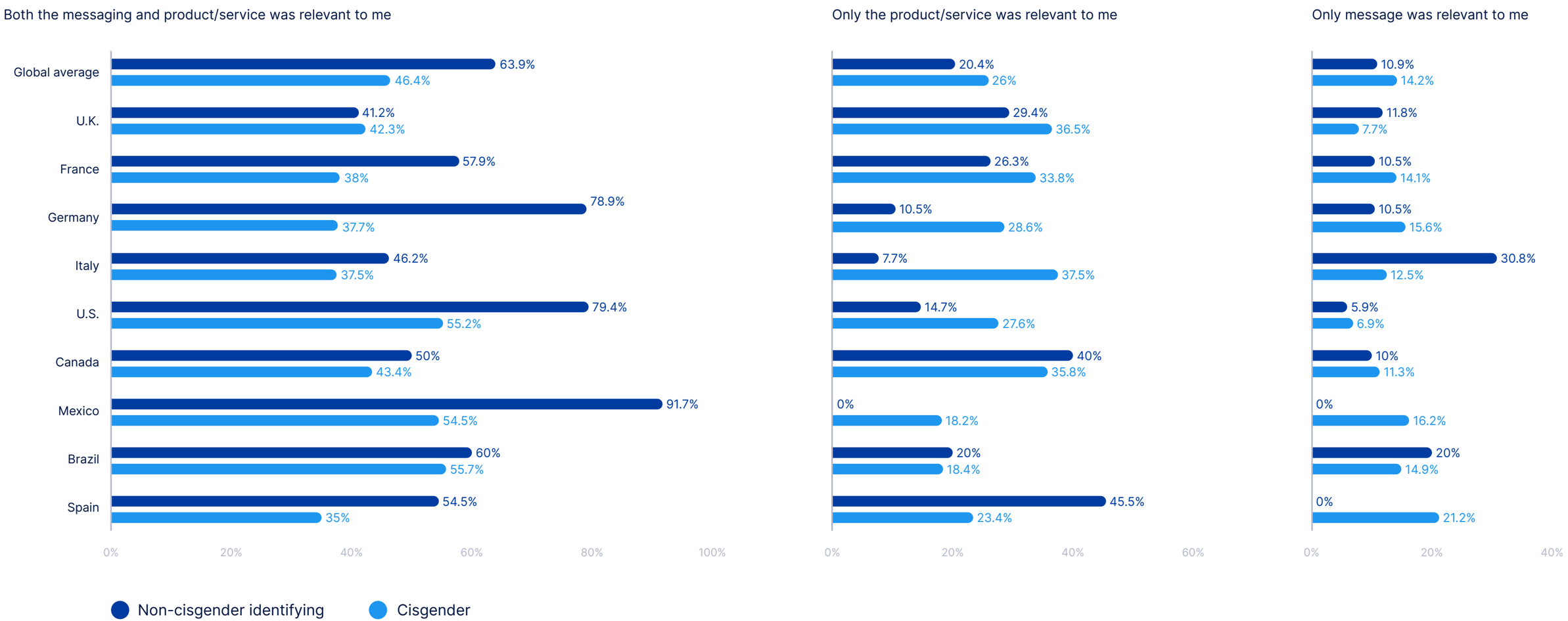
Relevance of targeted ad messaging and product

Among non-cisgender identifying and cisgender audiences



Read as: 41.2% of non-cisgender identifying audiences in the U.K. believe that the messaging and product of the most recent targeted ad they received was relevant to them.

Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study

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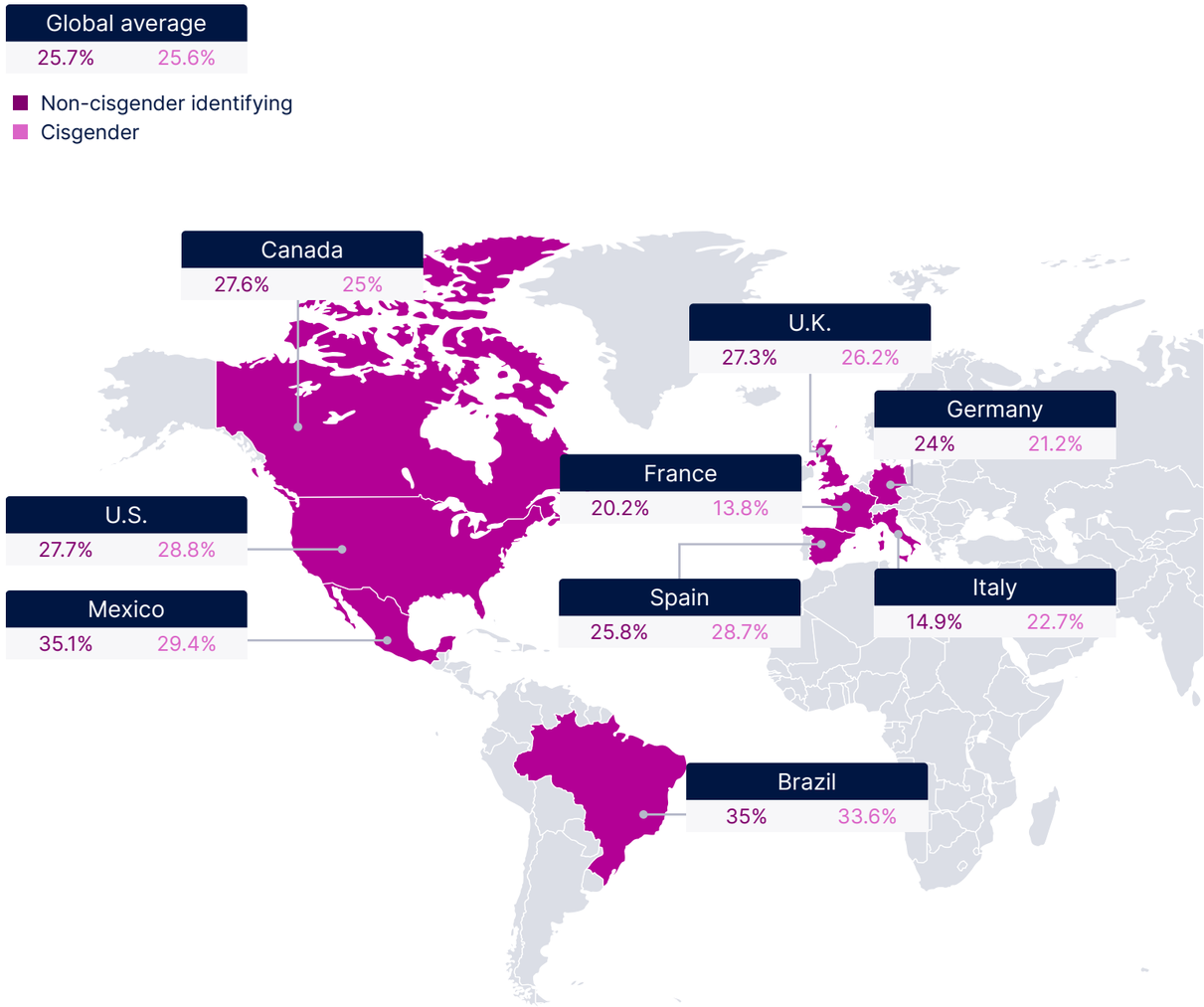
Public interest in LGBTQ+ media representation is low in some countries

As recent history illustrates, not everyone is receptive to inclusivity. This is separate from whether consumers are comfortable with targeted advertising, and today's media landscape makes it very easy for anyone to magnify the reach of any audience-specific ad, campaign or initiative—a consideration for brands as they broaden their marketing strategies to be more inclusive and personalized.

Globally, only 25.6% of cisgender people say they'd like programming and advertising to do more to celebrate inclusivity and positive stories about LGBTQ+ individuals. The percentage is higher in Brazil (33.6%), Spain (28.7%) and the U.S. (28.8%), but is much lower in France (13.8%) and Germany (21.2%). Among heterosexuals, the global average is just 21.3%.

Belief that celebrating inclusivity and sharing positive stories would improve LGBTQ+ inclusivity in ads and content



Read as: 27.3% of non-cisgender identifying audiences in the U.K. believe that celebrating inclusivity and sharing positive stories would improve LGBTQ+ inclusivity in ads and content.

Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study.

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Content inclusivity lags advertising inclusivity

Where brands show up for their consumers is just as important as how they show up. Inclusive content paired with inclusive brand messaging can be a powerful combination, but it remains hard to find for some diverse communities.

Around the world, linear TV remains the primary option for TV content[5], but linear programming offers limited LGBTQ inclusive content for audiences. According to Nielsen Gracenote Global Video Data, there were just 416 program titles on linear television as of April 2023 that include video descriptor metadata[6] indicating some level of LGBTQ+ representation (theme, topic, character, etc.).

In Mexico[7], individuals with a pay TV service watched an average of 341 minutes of pay TV per day in 2022.

In Puerto Rico, individuals with a pay TV service watched an average of 368 minutes of pay TV per day in 2022, up from 342 minutes in 2021.

In Malaysia, audiences spent an average of 207 minutes with traditional TV per day (free, pay, time-shifted) last year; in South Korea, audiences spent an average of 190 minutes.

In the U.S., audiences spent just under two hours and 40 minutes with live TV and an additional 36 minutes of time-shifted TV in fourth-quarter 2022.

Audiences have nearly 7x more LGBTQ+ inclusive programming to choose from on streaming platforms than on linear TV

Source: Gracenote Global Video Data, April 2023

[5] The country-level viewing data here is attributable to Nielsen TV audience measurement. In the U.S., the source is Nielsen's national TV panel.

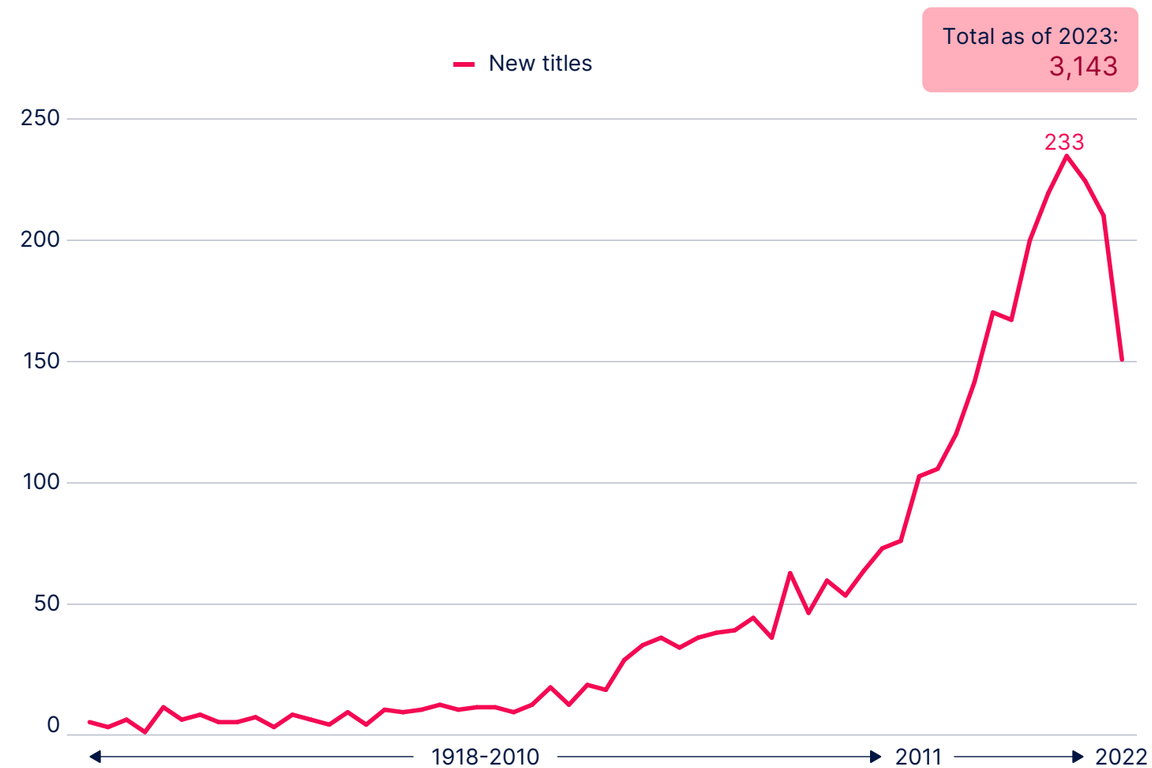
[6] Metadata is the data about a specific program, such as content description, cast, crew, original air date, production countries and description languages. Video descriptors are assigned to the programming that is most popular among viewers.

[7] Nielsen measures TV audiences in 28 cities in Mexico.

LGBTQ+ audiences have nearly seven times the amount of representative programming to choose from on streaming platforms (2,777 titles), bringing the total across linear and streaming platforms in late April 2023 to 3,193 video titles. Yet while we saw a notable annual increase in new LGBTQ+ representative content between 2011 and 2019, the number of new titles declined in 2020, 2021 and 2022. Of note, engagement with ad-supported streaming services is on the rise. In the U.S., subscription video-on-demand services accounted for just over half (51%) of total streaming use in 2022[8]; ad-supported video-on-demand accounted for 25% and streaming via MVPD/vMVPD[9] accounted for 14%.

Tracking the availability of LGBTQ+ inclusive programming

New titles released each year



Note: This list excludes 50 titles for which no premiere date is available.

Source: Gracenote Global Video Data.

[8] Nielsen Streaming Platform Ratings

[9] MVPD stands for multichannel video programming distributor. Common examples include Xfinity, DISH Network, DirecTV, Spectrum, and Time Warner Cable. vMVPD stands for virtual multichannel video programming distributor. Common examples include Sling TV, Hulu Live TV and fubo TV.

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Factors that will shape the future of inclusive content

The dips in 2021 and 2022 reflect two distinct dynamics that will shape the future of the video industry in years to come:

1. Reduced content production amid economic uncertainty, layoffs throughout the industry, the writer's strike in the U.S. and the fight to stay afloat following the bursting of the streaming bubble.

2. The increasing importance of descriptive-rich video metadata, which is critical in helping viewers discover relevant content as the wealth of available content grows. Nielsen's most recent U.S. streaming content consumer survey[10], for example, found that adults now spend 11 minutes and 16 seconds looking for something to watch, which is up 52% from March 2019.

Rich video metadata is critical in viewer discovery journeys amid a wealth of new and often-changing representative content

[10] Sept. 22, 2022-Oct. 5, 2022 via online survey.

As media companies scale back production and think more strategically about content, it goes without saying that content aimed at specific audiences will be more affected than content developed for broad audiences—but that may be a misguided approach. According to the latest Where We Are on TV Report from GLAAD, 175 LGBTQ characters will not be returning year-over-year with 140 of those specifically on series which were cancelled or otherwise ended. In an independent study, online publication *Them* analyzed the shows that went off the air last year and identified 30 that featured LGBTQ+ characters. Of these 30, 21 featured queer women characters. Although tough business decisions are being made, platforms and content distributors should pay special attention to how they are narrowing or expanding representation of historically excluded communities.

We know, however, that audience-inclusive content does appeal to wide-ranging viewers. In our 2022 Attitudes on Representation on TV study in the U.S., we found that 87% of audiences are interested in watching shows featuring people from outside their own identity group. Among viewers 25-34, 15% say they're "extremely interested."

8.7 billion

minutes of viewing in 2022

This FOX drama, which recently ended its fourth season, won the GLAAD Media Award for Outstanding Drama Series in early 2023. A spinoff from the original *9-1-1, 9-1-1: Lone Star* features three lead characters who identify as LGBTQ+, one of whom is a transgender male. Unlike *9-1-1*, which FOX did not renew for a seventh season (ABC has picked it up for season 7), *9-1-1: Lone Star* has been renewed by FOX for a fifth season.

Data source: Nielsen National TV panel, 2022; adults 18 and older; live +35

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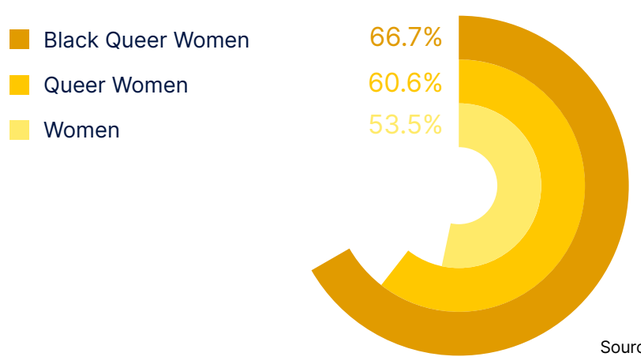
Spotlight

Black queer women: seeking choice and curated media content

The amount of nuance and intersectionality within the LGBTQ+ community highlights an array of individual needs and demands with respect to content. Black queer women, for example, represent an identity group that intertwines race, gender and sexual orientation. This intersectionality translates into a unique perspective with respect to content—especially when it comes to how and what to engage with.

While the majority of queer women in the U.S. agree that content choice and curation matter within their streaming video discovery journeys, for example, they are more important for Black queer women. Two out of three, in fact, say that it's essential that they select what they want to watch, well above the 54% of all women who feel that way.

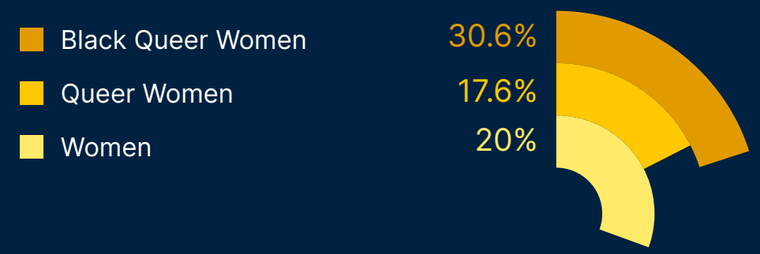
It's essential that I get to select what I watch through Internet streaming services, such as Netflix or Amazon Prime



Source: Nielsen Scarborough USA+, 2022 Release 2

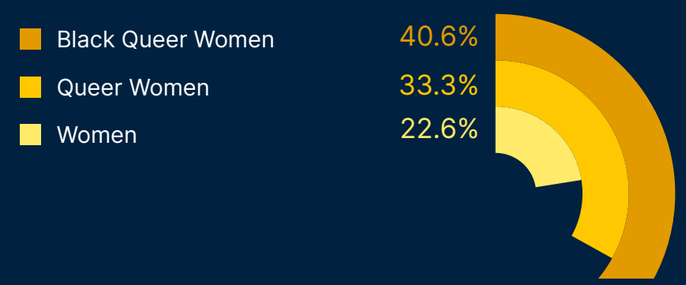
And while headlines about the importance of radio may not be as prominent in today's media news cycle driven by the streaming wars, audio content is a critical connection point for Black queer women. In fact, 31% say their radio stations help them stay connected with their community, which is much higher than the 18% of all queer women.

My favorite radio stations help me stay connected to my community



Social media is also more important as a news source for Black queer women than it is for all queer women and women in general, as they're twice as likely to look to social media to stay current with news headlines. Black queer women are also less likely to avoid news because it's too negative.

I get most of my news through social media platforms such as Facebook, Twitter, YouTube, etc.



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Video content remains very non-inclusive of LGBTQ+ audiences

While LGBTQ+ related video content is limited, streaming platforms account for 87% of what's available, and that's not lost on audiences. Given the more limited content on traditional TV, LGBTQ+ audiences view movies and programs there as notably more non-inclusive than movies and programs on streaming services—and so do heterosexual audiences.

Perceptions of "very non-inclusive" content by TV option

By identity group

Read as: 46.8% of people who identify as asexual view movies and programs on traditional TV as very non-inclusive.

Note: LGBTQ+ Aggregate combines all respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure.

Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study.

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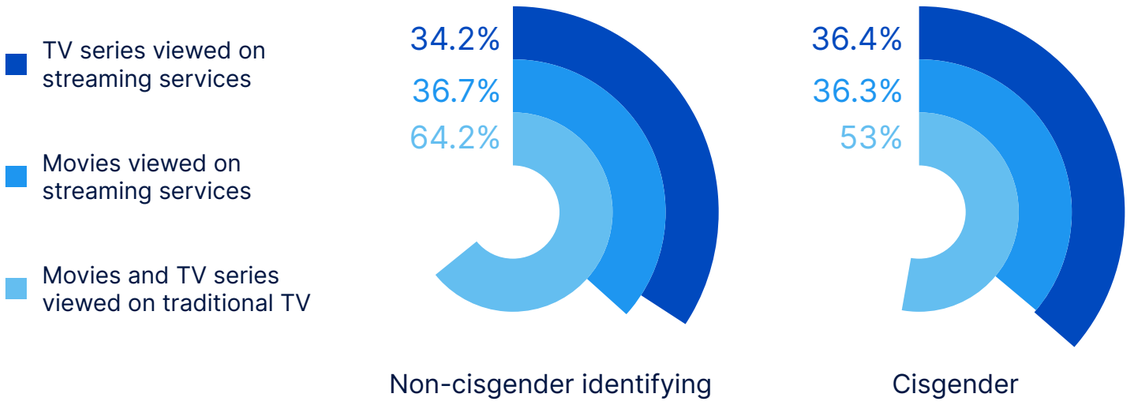
Among non-cisgender identifying audiences, perceptions of non-inclusivity on traditional TV are notably higher, and perceptions of programs and movies on streaming platforms are viewed more favorably.

Perceptions of "very non-inclusive" content by TV option



Read as: 64.2% of non-cisgender identifying audiences view movies and series on traditional TV as very non-inclusive.

Note: Non-cisgender identifying people do not follow other people's ideas about how they should look or act based on the female or male sex they were assigned at birth. Cisgender refers to people whose gender identity corresponds with the sex they were assigned at birth.

Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study.

LGBTQ+ audiences universally believe that avoiding stereotyping in content is the best way to improve inclusivity in content

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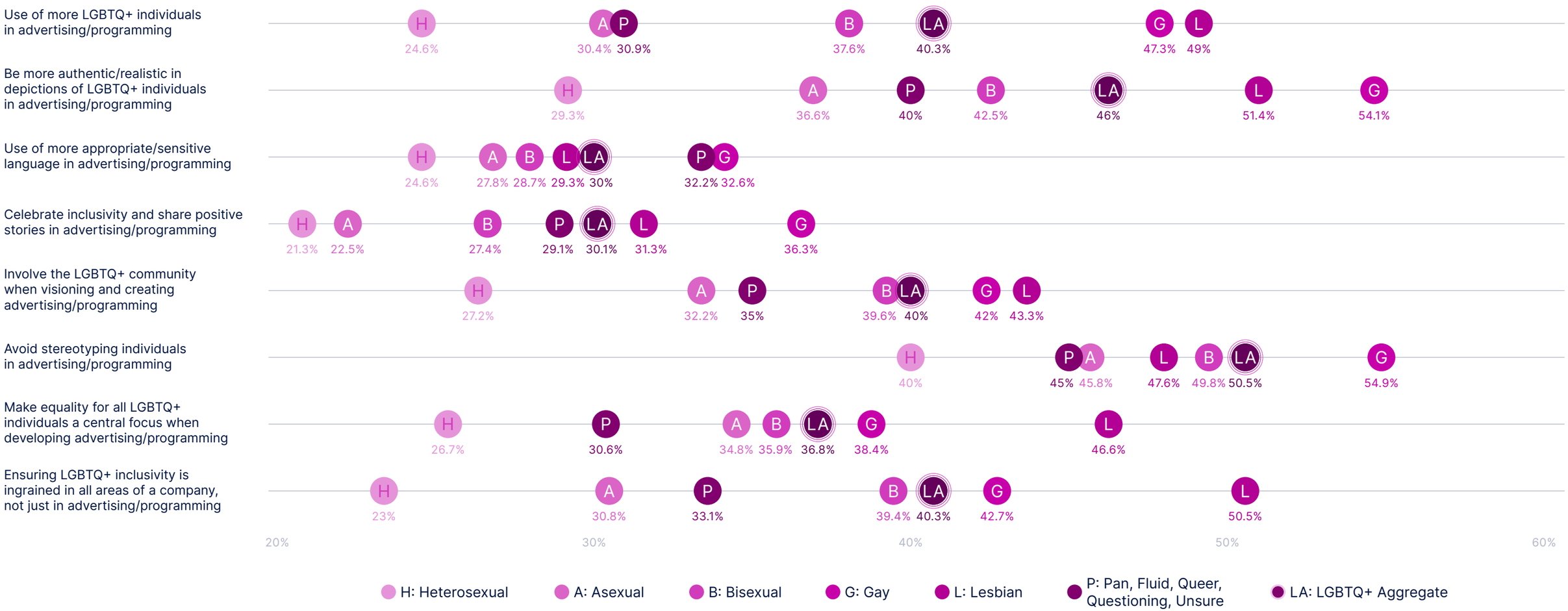
Enhancing inclusivity

Importantly, increased inclusion isn't limited to increased or new productions. Yes, audiences would relish an infusion of new inclusive content, but there are ways media can boost representation within existing production and marketing plans. For example, 47.3% of people who identify as gay and 49% of people who identify as lesbian believe adding more LGBTQ+ to programming and content would enhance inclusivity in content and ads. People who identify as bisexual feel strongest about making LGBTQ+ depictions more authentic (42.5%) and avoiding stereotypes (49.8%).

Ways to improve inclusivity in programming and ads

By identity group



Read as: 30.4% of people who identify as asexual believe that using more LGBTQ+ individuals in content will help improve inclusivity in programming and ads

Note: LGBTQ+ Aggregate combines all respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure.

Source: 2022 Nielsen international global LGBTQ+ inclusive media perceptions study.

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From backlash to resilience

Recently, some brands have shown the desire to be more inclusive in their campaigns as they seek to engage new customers. We're also seeing content become increasingly inclusive, albeit at a slower pace than many would like. At the same time, however, digital connectivity gives anyone and everyone the opportunity to stir the pot—oftentimes in ways that magnify and divide.

Despite any short-term effects associated with divided audiences, experts agree that the vast majority of boycotts fail in the long term. Amid the fallout after the beer brand partnership with a transgender influencer, Maurice Schweitzer, a professor at University of Pennsylvania's Wharton School of Business, noted that boycotts need to be sustained and coordinated—which is rare. Nike stock, for example, is up 48.8% from when the brand faced backlash for partnering with Colin Kaepernick back in 2018.

On the subject of LGBTQ+ inclusion, Sarah Kate Ellis, president of GLAAD, says that brands know that it's good for business. Within the context of recent news, she was quoted in a TIME article, saying that "Companies will not end the standard business practice of including diverse people in ads and marketing because a small number of loud, fringe of anti-LGBTQ activists make noise on social media."

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Methodology

Nielsen international LGBTQ+ inclusive media perceptions study, 2022 – powered by Dynata
Survey of over 5,000 respondents via desktop, smartphone and tablet, conducted in 2021 and Q1 2022 across the U.S., Canada, Mexico, Italy, Germany, France, Brazil, Spain and the U.K.

Nielsen Attitudes on Representation on TV Study, 2022
Survey of over 2,000 smartphone respondents via Nielsen's Computer and Mobile Panel, weighted for age, gender, race, ethnicity, income and Android and iOS users conducted April 2022.

Gracenote Global Video Data
Gracenote Global Video Data is a collection of aggregated, normalized international video data, imagery and IDs. Video descriptors are a comprehensive set of identifiers bound by a unified hierarchical video descriptors taxonomy. They are used to comprehensively describe a program across the various video descriptor types like theme, character, etc.

Nielsen National TV Panel
U.S. television data is derived from Nielsen's National TV Panel that is based on a sample of over 41,000 homes that are selected based on area probability sampling.

Nielsen Scarborough USA+, 2022 Release 2
Scarborough measures the unique shopping patterns, product usage, demographics, lifestyles and cross-media behaviors of the American consumer at a local, regional or national level, giving the ability to profile over 2,000 measured categories and brands.

Nielsen Streaming Platform Ratings
Audience measurement data that details the amount of time consumers spend streaming and on which platforms.

U.S. streaming content consumer survey
Custom Nielsen study conducted in English only from Sept. 22, 2022 - October 5, 2022 via an online survey. It is based on a representative sample of 937 U.S. adults 18+ who currently use streaming video and/or audio services.

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