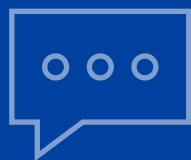# PROUD & PRESENT

LGBTQ AUDIENCES & CONTENT TAKE CENTER STAGE

Nielsen Diverse Intelligence Series

June 2021

INTRODUCTION

This year marks the 51st anniversary of the celebration of PRIDE month in the U.S. There's a lot for the LGBTQ community to celebrate in 2021, just one year after PRIDE parades and celebrations were cancelled as a result of the pandemic. Among the things to celebrate is that the strength and size of the community is growing, both in number and in influence. In fact, for the first time, the U.S. Census Bureau's America's Families and Living Arrangements study included estimates of same-sex households, showing 543,000 same-sex married households. In addition, in 2020, a Gallup study noted that LGBT identification has risen to 5.6%.

As the LGBTQ community has continued to move from the margins to claim their equality, there is no doubt that digital technology is the single most influential factor in organizing and connecting them and their allies. Digital access has reduced isolation, created safe spaces for self-expression, offered opportunities to connect a disparate community and provided easy access to educational resources and curated content. Technology has also given the community a place to be seen authentically. From television and streaming services to podcasts and music services, the development of and access to LGBTQ content and talent have increased exponentially. Join us as we explore the digital lives of the community and how technology has empowered them and their allies to demand equality for visibility and representation in content.

543,000 SAME-SEX MARRIED HOUSEHOLDS IN THE U.S. IN 2019.

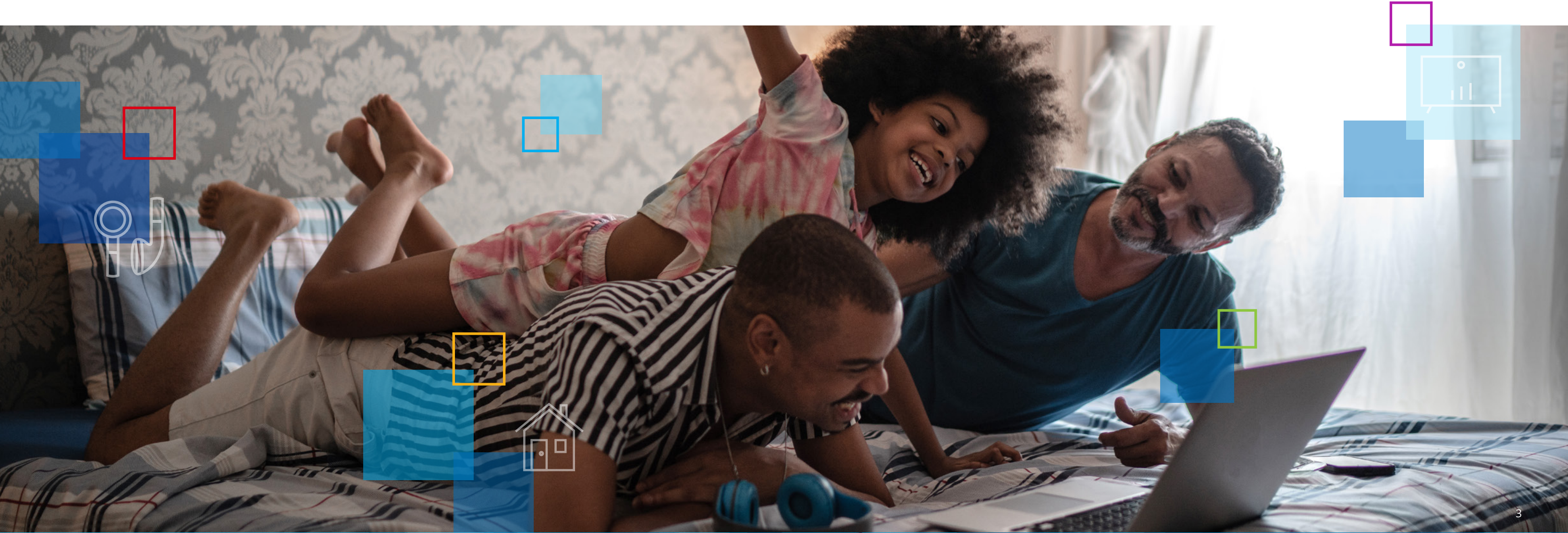**LGBT IDENTIFICATION ROSE TO 5.6% IN 2020.**

Sources: U.S. Census Bureau, 2019; Gallup Study, 2020
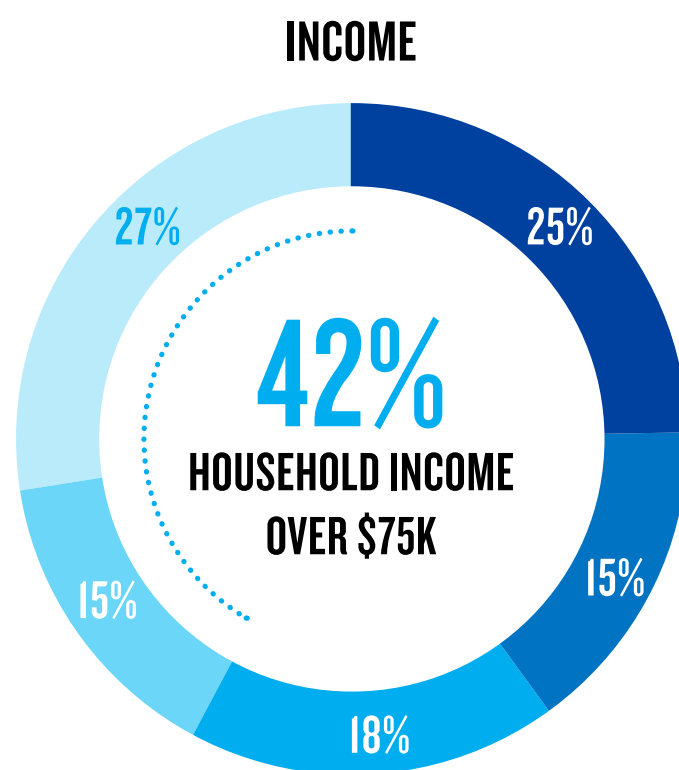
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LGBTQ STREAMERS

Digital connectivity has nurtured a community that is tech-savvy with a proclivity toward digital engagement. As a result, video streaming has surfaced as an important content consumption vehicle alive with bespoke content. While streaming is part of everyday life for all Americans, 85% of LBGTQ people report that they have used a video streaming service in the last 30 days, compared with 74% for the general population. Niche and easily accessible content makes YouTube is a streaming staple for LGBTQ audiences, whose usage of this platform outpaces general audiences by 34%.

YOUNG AND AFFLUENT

LGBTQ streamers are more likely to be millennials or Generation Z, with more disposable income to spend on multiple digital platform subscriptions. Variety and options surface as important factors for the LGBTQ community when it comes to finding content of choice. While there are clear preferences, the data shows that across the board, the community over-indexes for use of almost all digital content delivery platforms.

AGE

NEARLY
2/3
18-34 YEARS OLD

18%
22%
60%
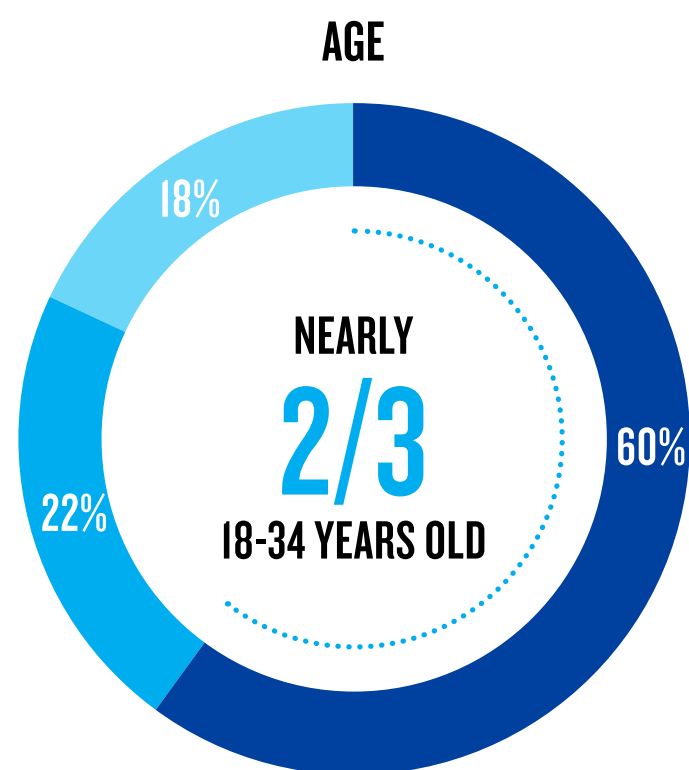
Adults 18-34 Adults 35-49 Adults 50+

INCOME

42%
HOUSEHOLD INCOME
OVER $75K

25%
27%
15%
18%
15%

< $35,000 $35k-$49,999 $50,000-$74,999 $75,000-$99,999 > $100,000

Source: Nielsen Scarborough USA+ 2020, Release 2

LGBTQ STREAMING PLATFORMS USED IN THE PAST 7 DAYS

	Percentage	INDEX
AMAZON PRIME	26%	118
HBO NOW	9%	171
HULU	33%	165
NETFLIX	56%	130
YOUTUBE FREE	57%	134
YOUTUBE PAID	4%	116
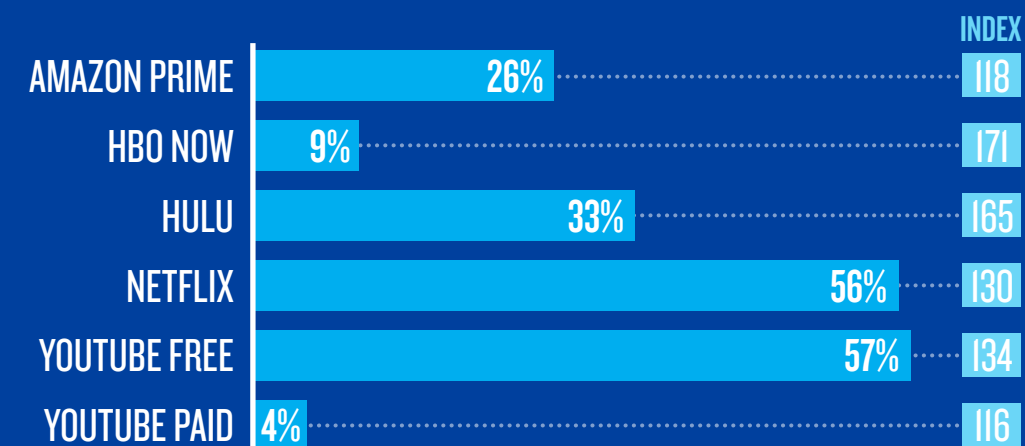
How to read: Of LGBTQ respondents, 26% said that they had used Amazon Prime in the past 7 days, and they are 18% more likely to have done so than the total population.

Source: Nielsen Scarborough USA+ 2020, Release 2

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SOCIAL MEDIA BELLWETHERS

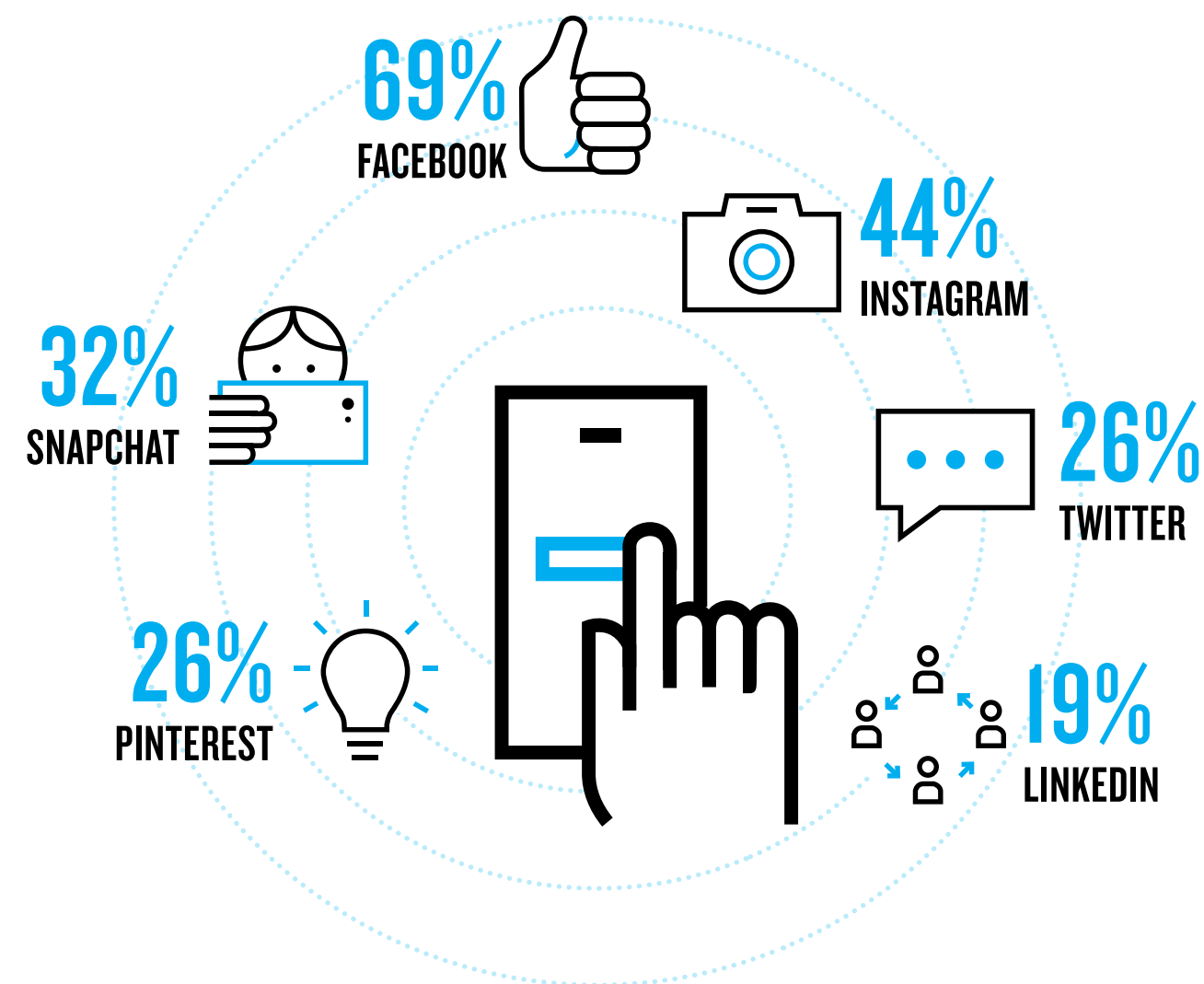For LGBTQ people, sexual orientation discrimination and religious persecution are still concerns in many parts of the world. Social media channels have empowered the community to organize and connect online, leading to heavy social media use.

LGBTQ streamers are nearly two times more likely to be heavy social media users than the total population. Flexing their social muscle within online communities, more than 40% of LGBTQ streamers spend 3 or more hours per day on social media and are 44% more likely to have spent 5+ hours a day on social media. When LGBTQ streamers are on social, they are 80% more likely to have used Snapchat, Instagram and Twitter in the last month than the general population.

PERCENT THAT HAVE USED SOCIAL SITES IN THE PAST 30 DAYS

69% FACEBOOK

44% INSTAGRAM

32% SNAPCHAT

26% TWITTER

26% PINTEREST

19% LINKEDIN

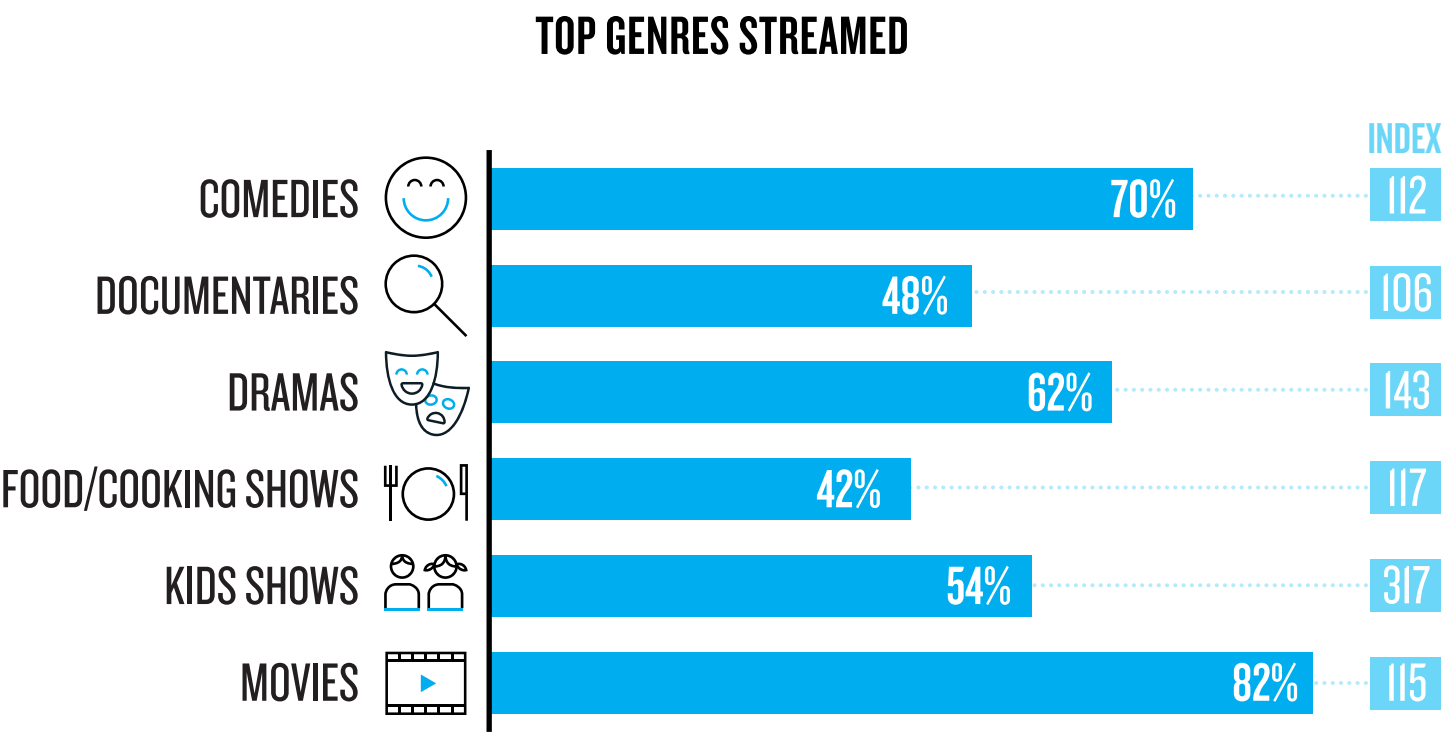Source: Nielsen Scarborough USA+ 2020, Release 2

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SPOTLIGHT ON LGBTQ FAMILIES

While the prevalence of marriage in the general population continues to decline, the number of same-sex married couples has increased significantly in the last decade. According to 2019 estimates from U.S. Census, there are 543,000 same-sex married couple households, with about 20% having one or more child in the home.

Households headed by same-sex spouses where children are present are 3x as likely to be large families of four or more people in the home compared to the general market. These households are connected to premium content, with 88% telling us they have used a video streaming service in the past 30 days and they are 18% more likely to do so than the general population. Along with Netflix and Amazon Prime Video, Roku is a big part of the family in households with kids and among same-sex spouse families where usage has more than doubled since 2019—a rate of growth that outpaces families overall.

When it comes to preferred content, same-sex spouse families' top genres include Drama, Comedy, Documentary, Food/Cooking shows.

KIDS PROGRAMMING AND DRAMAS WIN IN SAME-SEX SPOUSE FAMILY HOMES

TOP GENRES STREAMED

| Genre	Percent	INDEX
COMEDIES	70%	112
DOCUMENTARIES	48%	106
DRAMAS	62%	143
FOOD/COOKING SHOWS	42%	117
KIDS SHOWS	54%	317
MOVIES	82%	115

How to read: 70% of Same Sex Spouse Familes say they typically stream Comedies, and they are 12% more likely to do than the total population.

Source: Nielsen Scarborough USA+ 2020, Release 2

Finding and sharing social content, stories and lived experiences rank high for same-sex families. These families over-index for spending more time with all major sites compared to total population.

SAME-SEX MARRIED HOUSEHOLDS SOCIAL MEDIA USE

PAST 30 DAYS

Platform	Percent
FACEBOOK	84%
INSTAGRAM	66%
PINTEREST	63%
SNAPCHAT	40%
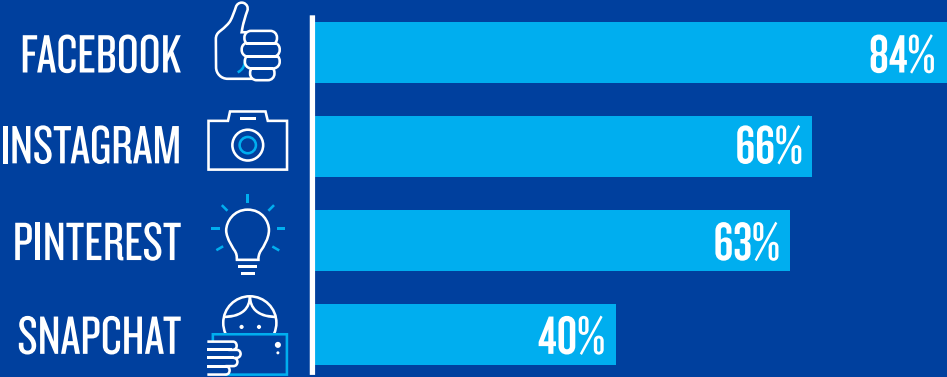
2X MORE LIKELY TO SPEND TIME ON SNAPCHAT (246) AND INSTAGRAM (270)

Source: Nielsen Scarborough USA+ 2020, Release 2

ON-SCREEN VISIBILITY

Representation in movies, television shows and ads can help change attitudes and remove bias about the lesbian, gay, bisexual, transgender and queer community. While LGBTQ presence in content has grown over the years, presence on screen isn't the same as representation. Equally important are the platforms where visibility occurs. Are LGBTQ stories and talent easily found across the television landscape? Where do people access queer content that tells their stories authentically and how does their relationship with technology shape that?

While LGBTQ storylines and characters have grown in on-screen presence over the years, only just recently have we seen an increase in representation of this identity group at the talent level. Our Gracenote Inclusion Analytics data showed that 26% of the top 300 programs in 2019 had representation of individual cast members who self-identify as LGBTQ, and that number has increased to 29% in 2020 top programming data.

> ## THE TOTAL SHARE OF SCREEN FOR LGBTQ ACTORS WAS 6.6% IN 2020 COMPARED TO 6.2% IN 2019.

Overall, the total share of screen for LGBTQ actors in 2020 on all platforms is up compared to 2019, illustrating progress in inclusive casting. This increase in representation indicates more opportunity for LGBTQ talent and more openness among the industry and audiences embracing diverse storytelling.

Early this year, when the House of Representatives passed the amendment to the Equality Act, it not only expanded discrimination protections, but also supported public dialogue about LGBTQ people's lived experiences and how they are reflected and included in content. From the inclusion of authentic storylines in mainstream romance genres to increasing transgender and nonbinary visibility, civil rights dialogue has opened the doors for narratives—shaping not only what stories are told for LGBTQ, but how they end, and whether or not that includes marriage or family.
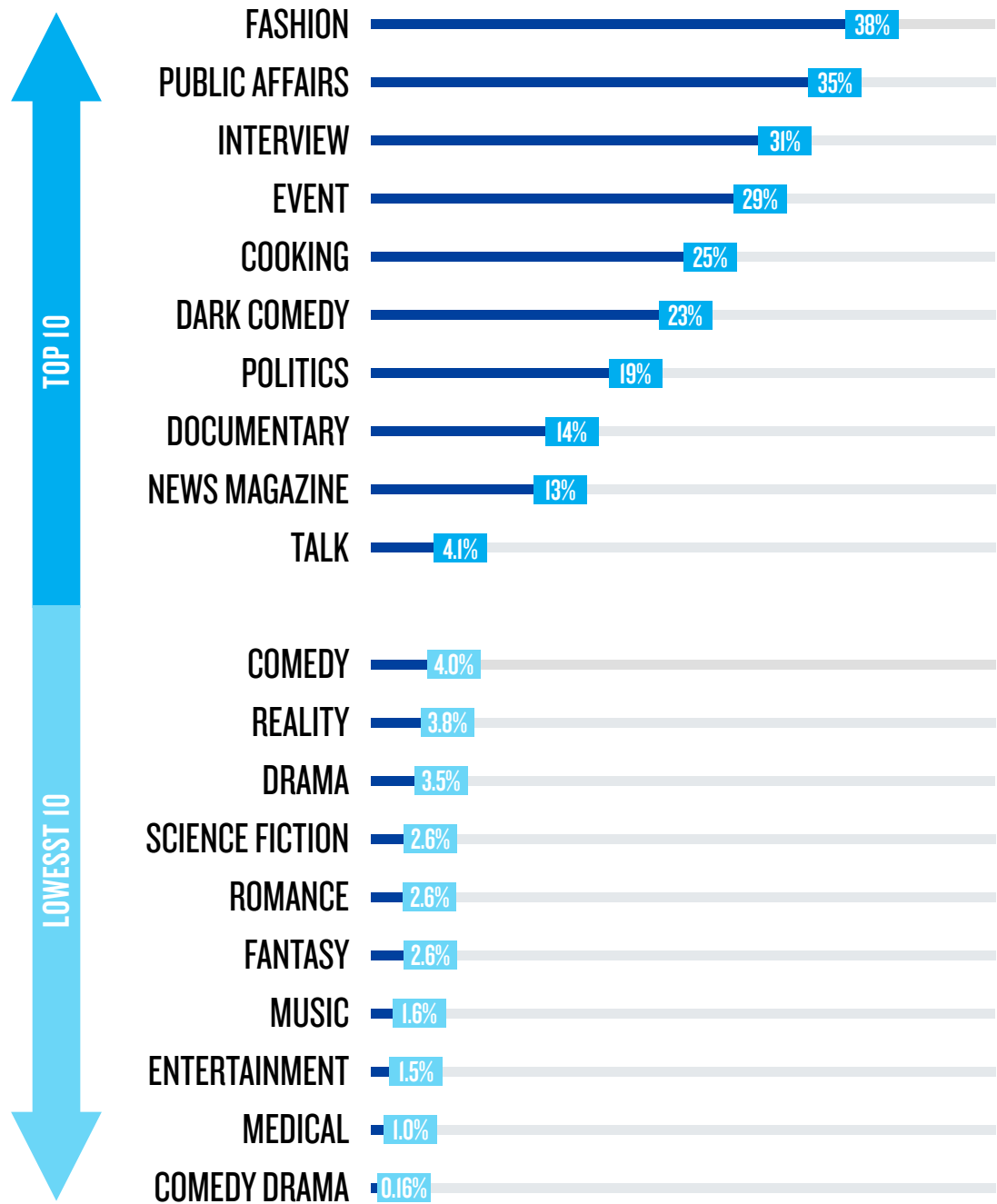
29% OF THE TOP PROGRAMMING IN 2020 HAD REPRESENTATION OF INDIVIDUAL CAST MEMBERS WHO SELF-IDENTIFY AS LGBTQ.

Source: Gracenote Inclusion Analytics 2019 & 2020

PRESENT BUT STILL UNSEEN

When it comes to authentic storytelling, presence isn't enough. LGBTQ talent visibility spans many genres, but there is opportunity to diversify visibility. The types of stories LGBTQ people are featured in do more than just entertain; they can advance inclusion and help erase bias and prejudice.
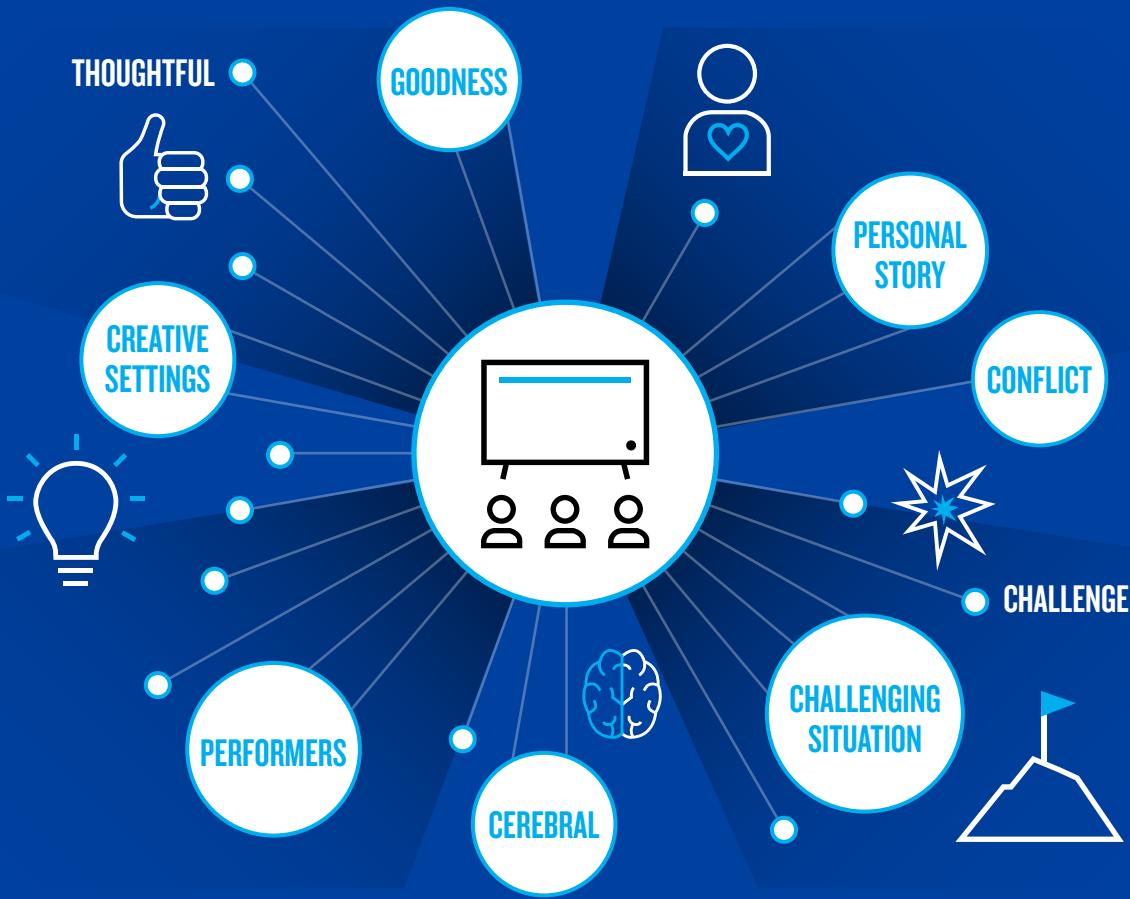
LGBTQ SHARE OF SCREEN BY GENRE

TOP 10

Genre	Share
FASHION	38%
PUBLIC AFFAIRS	35%
INTERVIEW	31%
EVENT	29%
COOKING	25%
DARK COMEDY	23%
POLITICS	19%
DOCUMENTARY	14%
NEWS MAGAZINE	13%
TALK	4.1%

LOWESST 10

Genre	Share
COMEDY	4.0%
REALITY	3.8%
DRAMA	3.5%
SCIENCE FICTION	2.6%
ROMANCE	2.6%
FANTASY	2.6%
MUSIC	1.6%
ENTERTAINMENT	1.5%
MEDICAL	1.0%
COMEDY DRAMA	0.16%

Source: Gracenote Inclusion Analytics 2020

TOP THEMES IN STORIES FEATURING LGBTQ TALENT

THOUGHTFUL
GOODNESS
PERSONAL STORY
CREATIVE SETTINGS
CONFLICT
CHALLENGE
PERFORMERS
CHALLENGING SITUATION
CEREBRAL

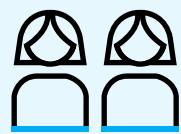Source: Gracenote Video Descriptors 2020

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SEEKING CONTENT

With a wave of intersectional LGBTQ visibility in top content ranging from Black transgender representation in FX's *Pose* to lesbian Afro-Latinx storylines in Netflix's *Gentefied*, diverse and authentic intersectional representation of the community is surfacing across the media ecosystem. LGBTQ audiences and allies are seeking and supporting even more representative content, opening the doors for studios and producers to meet the demand.

Streaming platforms are increasingly investing in more original stories from the queer community, with nearly 20 original shows in development or production in 2021.
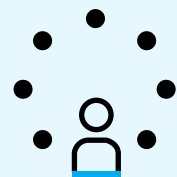
2021 TELEVISION PROJECTS WITH LGBTQ THEMES IN VARIOUS STAGES OF DEVELOPMENT AND PRODUCTION

NEARLY A THIRD OF THE NEW SHOWS IN DEVELOPMENT CENTER OR FEATURE BLACK STORYLINES	**ABOUT HALF OF THE PROGRAMS FEATURE LESBIAN STORYLINES**	**12 UPCOMING PROJECTS ARE PERIOD PIECES EXPLORING THE UNTOLD HISTORY OF LGBTQ PEOPLE**

By platform, in 2020, Gracenote Inclusion Analytics data reveals that broadcast television and streaming had the most representation of queer talent (7%), followed by cable (6%). With the highest representation of queer talent, subscription video on demand super-serves audiences with meaningful content that resonates, making it easier for queer audiences to find relevant programming.

Source: Gracenote Studio System 2021

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SPOTLIGHT: CREATING AUTHENTIC BRAND ENGAGEMENT

Every year, as the month of June starts, PRIDE rainbows seem to blanket Main Street to Wall Street, offering unity and celebration of the LGBTQ community. It is past time for visibility and progress and disingenuous brand dialogue. Capitalizing on June and PRIDE celebrations does more than just discourage engagement, it can be downright offensive.

LGBTQ BUYING POWER IN THE U.S. IS MORE THAN $1 TRILLION.

According to the Human Rights Campaign, LGBTQ buying power in the U.S. is more than $1 trillion. Yet, brands and marketers are still lagging in meaningful investments in inclusive messaging that reaches the community year-round. Today's Generation Z and millennials are the most LGBTQ inclusive generations yet, and they say that they are more likely to do business with a company that supports causes they care about. While "rainbow washing" should be avoided, there are some advertisers who are seeking (and finding) authentic opportunities for brand dialogue with diverse consumers across the media landscape. The queer community, with the power of the pink dollar, presents a perfect opportunity for year-round engagement.

One way to engage the LGBTQ community is through brand integration in platforms that cater specifically to them. Revry is a global ad-supported video on demand (AVOD) and digital cable network whose mission is to offer diverse and inclusive entertainment that resonates with the queer community, serving more than 250 million households. The network works with brands to build authentic relationships with LGBTQ viewers through content that resonates beyond PRIDE. Smart brands that reach the heart of the queer community authentically and often with their messaging and support are likely to see a substantial return on investment (ROI).

"At Revry we don't just see the value of the LGBTQ+ community year-round, we live it. We know the impact for queer audiences and consumers searching for accurate and nuanced representation in content. And we know the value our audiences present to brands that invest in targeting our community with respect and humanity."

– DAMIAN PELLICCIONE, REVRY CO-FOUNDER AND CEO

Revry's work with Lexus was a big win early this year, with an ad campaign featuring MJ Rodriguez of FX Pose fame, a transgender Afro-Latina. The campaign reached more than 17 million viewers on television.* This historic talent and brand integration was the focus of a special event on Revry that explored the powerful moment in LGBTQ representation with their streaming audiences. "This piece in particular allowed us to further customize and celebrate an authentic and historic brand partnership with original content for our viewers," said Pelliccione. "By acknowledging the impact of the MJ Lexus campaign, the brand reaffirmed their commitment to our community. And going by the feedback from our pleasantly surprised audience, also gained new fans and potential customers!"

*Source: Nielsen Ad Intel

LISTENING & LEARNING THROUGH AUDIO CONTENT

LGBTQ people turn to digital audio platforms for curated content when they are on the go. They to listen to music as well as create, edit and share playlists, with 71% of LGBTQ saying they have streamed music in the past 30 days compared to just 59% of the total population.

When it comes to services, Spotify is tops, with 35% of LGBTQ saying they have used the service in the last 30 days, and they are 69% more likely than the general population to do so. Pandora and Apple Music take second and third places for most listened to with 25% and 16% respectively.

When it comes to streaming content, music is primary, but there is more in the ecosystem that meets the community needs.

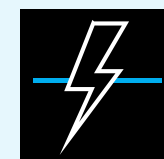## TOP GENRES FOR LGBTQ PODCAST LISTENERS

COMEDY
53%

NEWS
47%

SOCIETY & CULTURE
35%

TRUE CRIME
30%

NEARLY **50%** SAY THEY USE STREAMING AUDIO FOR **BREAKING NEWS.**

32% REPORT LISTENING TO **PODCASTS** COMPARED TO 24% OF THE TOTAL POPULATION.

27% OF LGBTQ PODCAST LISTENERS TUNE IN MORE THAN **5 HOURS A WEEK.**

Source: Nielsen Podcast Recontact Study (USA+) 2020 Release 2 Total (May 2021)

A LIFELINE FOR VALIDATION

Even though we have made great strides for basic human rights for LGBTQ people, the physical and digital world are not free of intimidation and harassment. But digital connections are a pathway to affirmation—through visibility in content, shared community and a lifeline for acceptance. As technology has advanced, the digital world is still among the most powerful places for the LGBTQ community to satisfy the human need to connect, be recognized, and to find representation of self in content.

The journey has just started, and more people are finding safety, acceptance and empowerment in publicly identifying as LGBTQ. The community is powerful and present, but brands, content developers, distributors and networks need to recognize that the community is also complex and intersectional with layered identities. Authenticity speaks volumes, and the community is listening.

METHODOLOGIES & CONTRIBUTORS

NIELSEN SCARBOROUGH

Nielsen Scarborough USA+ 2020 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 SCARBOROUGH PODCAST BUYING POWER (USA+), MAY 2021

Nielsen's Podcast Buying Power provides podcasters and brands with compelling information that associates podcast listeners by genre with their buying habits from Nielsen Scarborough. Using a robust sample, Nielsen's Podcast Buying Power service surveys individuals using tailored questions about podcast listening across 18 podcast genres and more than 2,000 consumer categories.

GRACENOTE INCLUSION ANALYTICS

Designed to accelerate diversity and equity in media, Gracenote Inclusion Analytics illuminates representation of on-screen talent compared with audience diversity. The solution empowers content owners, distributors and brands to make better informed decisions around inclusive content investments. www.nielsen.com/inclusionanalytics

GRACENOTE VIDEO DESCRIPTORS

Video Descriptors are a comprehensive set of descriptors bound by a unified hierarchical Video Descriptors Taxonomy. The descriptors are used to comprehensively describe a program across the various Video Descriptors Types like Theme, Character etc. The data set is created by specially trained Gracenote editors using a rigorous tagging process to ensure a high-quality and consistent metadata product. Each video descriptor assigned to a program has a Video Descriptor Weight associated with it. The weights give the degree of importance of the descriptor for the program.

GRACENOTE STUDIOSYSTEM

StudioSystem data is the most comprehensive, accurate and up-to-date information available on Hollywood's most important people and projects. From actors, producers, directors, writers, agents and below-the-line talent to the feature Films, TV Shows and Digital Content projects. Our mediography includes Upcoming, Past, Inactive, In Development, Industry Deals, Box Office, TV and Movie Project including Pilot Start Date, Network, Studio, Production Company, Development Notes, Actors, Producers, Director, Editor, Writers, Art Department, Casting, Prod. Management, Camera Film and Tape, Executive, Awards, and more.

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ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a leading global data and analytics company that provides a holistic and objective understanding of the media industry. With offerings spanning audience measurement, audience outcomes and content, Nielsen offers its clients and partners simple solutions to complex questions and optimizes the value of their investments and growth strategies. It is the only company that can offer de-duplicated cross-media audience measurement. Audience is Everything™ to Nielsen and its clients, and Nielsen is committed to ensuring that every voice counts.

An S&P 500 company, Nielsen offers measurement and analytics service in nearly 60 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on twitter.com/Nielsen, linkedin.com/company/nielsen, facebook.com/Nielsen and instagram.com/lifeatnielsen.

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