Nielsen

Seeking authenticity

A view of international LGBTQ+ media perceptions

Powered by dynata™

Diverse Intelligence Series • June 2022

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Introduction

Global attitudes about the LGBTQ+ community have evolved dramatically over the past decade or so, and the community is acutely aware of this. These changing attitudes vary by country, which means perceptions about the community can vary as well. In Mexico and Brazil, for example, LGBTQ+ people say they feel more acceptance and see more visibility and inclusion in media and ads than they did in the past. While this has fostered a greater sense of optimism about what lies ahead for this community, the increased visibility has also sparked rising discrimination against LGBTQ+ people and a fear that hard-won human rights, like marriage equality, could be rolled back.

LGBTQ+ people's perceptions of how inclusion in media and advertising has evolved differ by age, gender, sexual orientation, the countries where they reside and their personal experiences with discrimination. This report looks at how LGBTQ+ adults in nine countries perceive inclusion on various media platforms, visibility in media, the value of community influencers and brand affinity when advertising and content are inclusive.

Editor's Note:
LGBTQ+ is used in this report to reference people who identify as lesbian, gay, bisexual, transgender, queer, intersex or asexual. 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.

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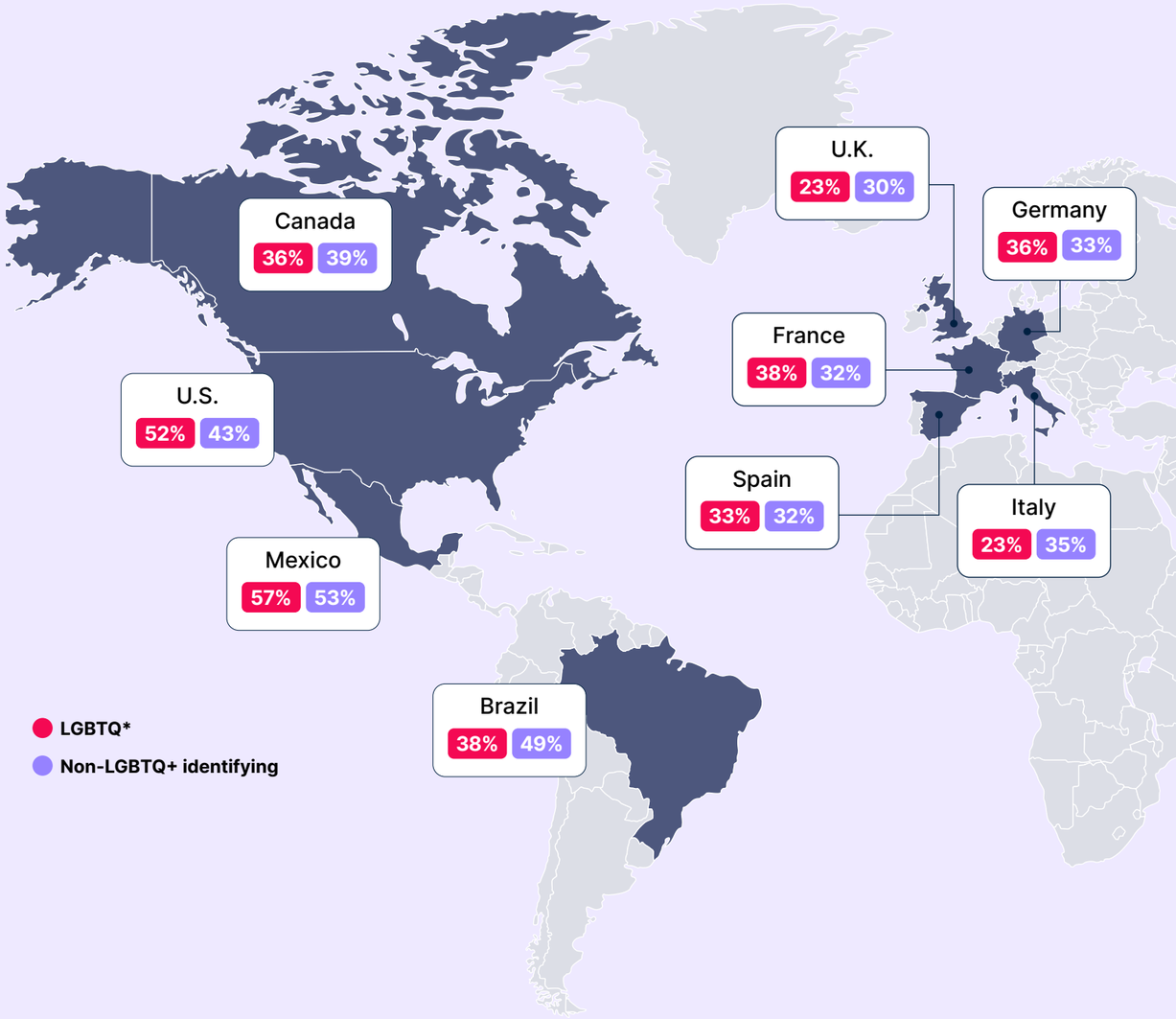
Modern culture in many countries is more versed in diversity, equity and inclusion than it once was, but the need for continued progress is ever present, especially for LGBTQ+ people around the world. Social equality remains an overarching goal, but many of the groups within the broader LGBTQ+ community have yet to obtain the same basic rights that cisgender heterosexual people have. According to the Human Rights Campaign, for example, same-sex marriage is legal in just 31 countries. For context, the U.N. has 193 member countries. But same-sex marriage represents just one right that the community is fighting for globally with support from allies as they stand up together against housing, health care and parenting legislation that is discriminatory and based on sexual orientation and gender identity.

Because the headwinds that LGBTQ+ people face vary by country and community, the global media industry can play a role in helping negate their impact—both on a local and global level—and foster positive change more swiftly. And importantly, the LGBTQ+ community is looking to the media industry and the brands that support it to evoke that change—well beyond the ability to seek and find new inclusive and representative programming to watch.

For example, a recent LGBTQ+ inclusive media perceptions study by Nielsen, powered by Dynata, found that more than one-third of LGBTQ+ respondents globally are comfortable with brands reaching out to them as members of the LGBTQ+ community. In the face of discriminatory policies often designed to marginalize the LGBTQ+ people, these consumers are looking to brands to take the lead on embracing inclusion. Within the nine countries we surveyed, the LGBTQ+ communities in Mexico and the U.S. were the most comfortable with inclusive campaigns, with more than half of LGBTQ+ respondents in those countries signaling they're open to inclusive brand messaging.

Comfort level with brand targeting



*LGBTQ includes respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure. Non-LGBTQ+ identifying represents respondents who did not identify as a part of the LGBTQ+ community.

Source: Nielsen international LGBTQ+ inclusive media perceptions study, 2022. Study included respondents from the U.S., Canada, Mexico, Italy, Germany, France, Brazil, Spain and the U.K.

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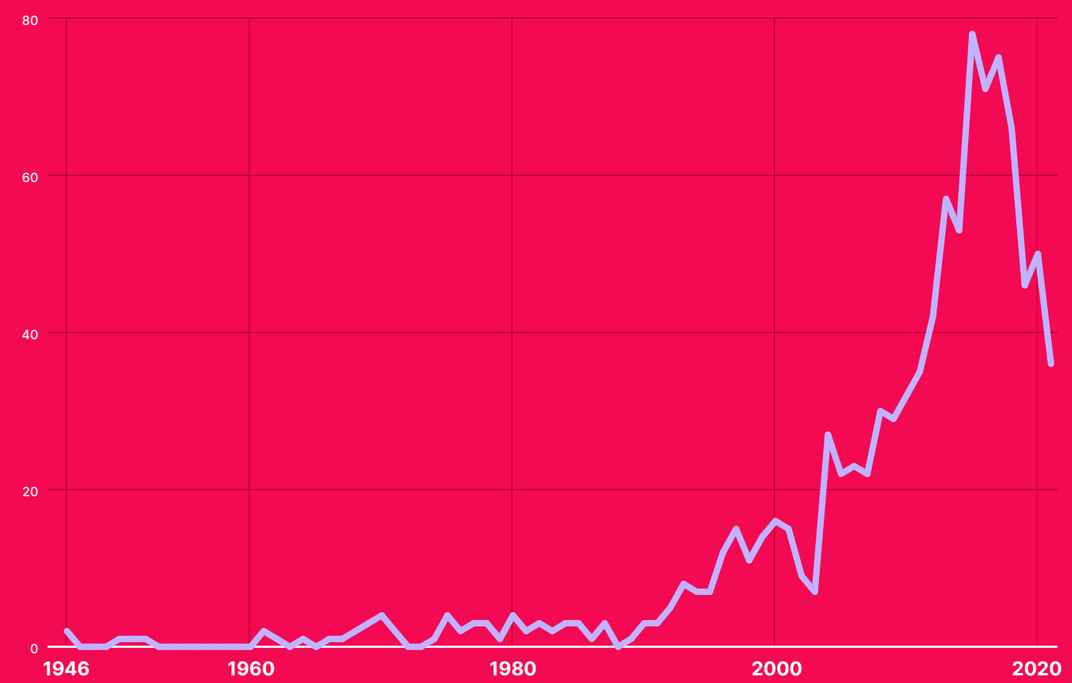
Inclusion and progress is evident, but slow

The calls for inclusivity have been building steadily over the years, and LGBTQ+ inclusion in media, both in on-screen representation and thematically in content, especially in TV and film, has increased significantly during the past 20 years. But momentum to advance more inclusive LGBTQ+ stories on screen is still needed. In fact, the premiere of new titles within the LGBTQ+ genre actually declined from 50 titles in 2020 to 36 titles in 2021.

Tracking the increase of LGBTQ+ programming

New titles released each year



Source: Gracenote Video Descriptors

LGBTQ+ audiences view movies, TV programs and social media as the most inclusive content and channels, with streaming standing out as the perceived most inclusive environment. Globally, respondents are 10% more likely than the general population to view streaming video as the most inclusive content type. The presence of an LGBTQ+ character or cast member is a start, but audiences are also looking for diversity in storylines, authenticity in experiences and content that inspires—a variety that streaming libraries seem to deliver on more consistently.

International LGBTQ+ audiences view streaming video as the most inclusive media type

According to GLAAD's most recent analysis, for example, the number of LGBTQ+ lead or recurring characters across eight global streaming platforms was two-and-a-half times higher than it was on U.S. broadcast and primetime cable programming.

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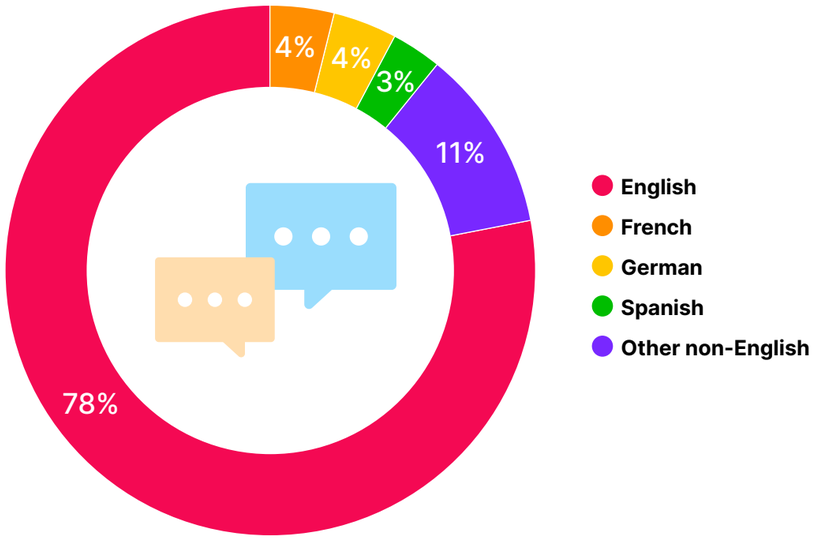
In aggregate, however, there is much work to be done. While Gracenote Global Video Data had identified 817,000 unique video titles as of February 2022, there are just over 1,000 within the LGBTQ+-related genre.

The geographic scope of the LGBTQ+ titles is more impressive, as more than 30 languages are represented, and 22% of the titles were developed in languages other than English. French (France and Canada) and German account for approximately 4% each, followed by Spanish-language content, at nearly 3%.

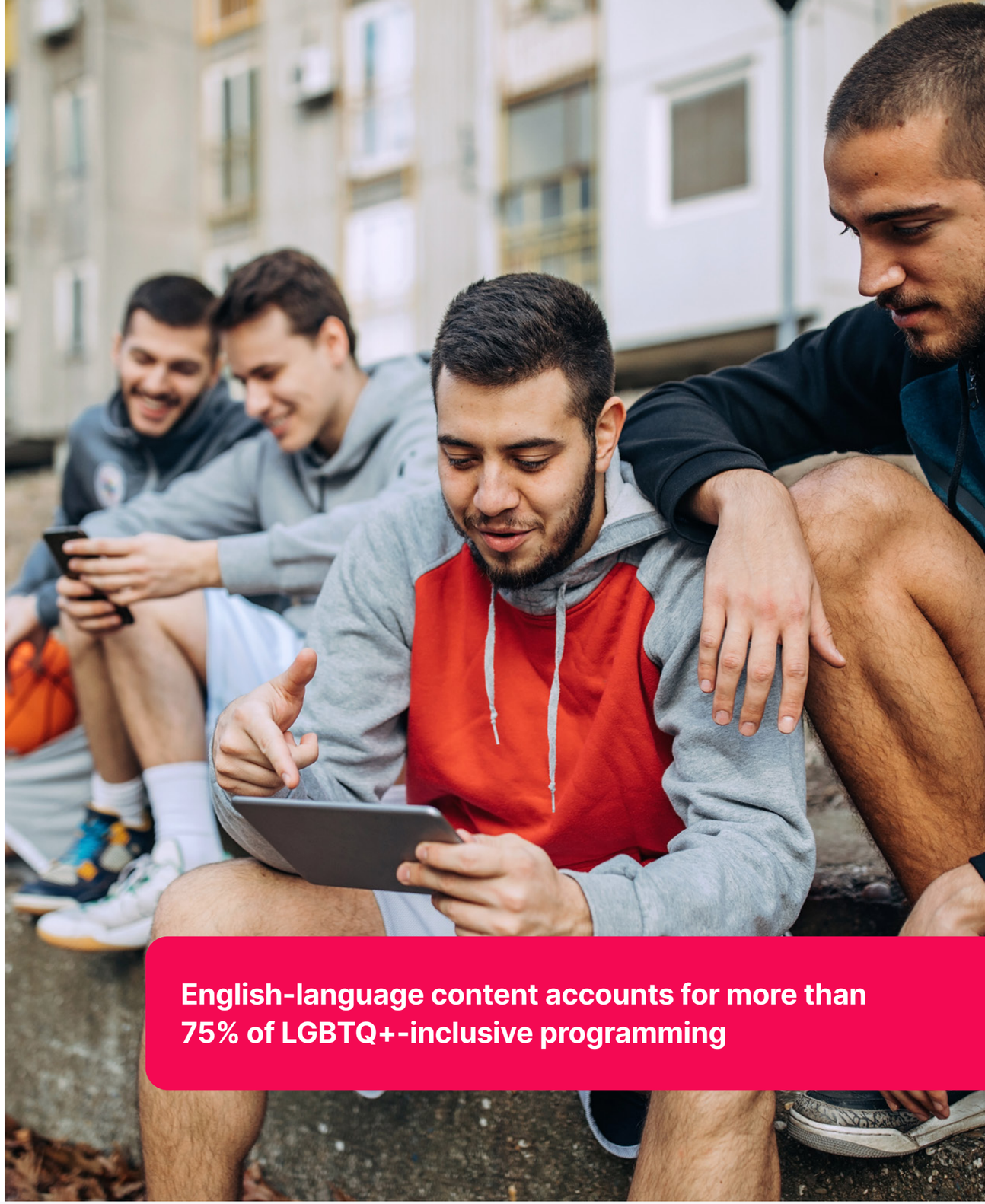
LGBTQ+ titles by language

Country and language of production is influenced by local acceptance and policy



Source: Gracenote Video Descriptors

Outside of the core LGBTQ+ genre, 400 new programs have been released in the last 20 years that include LGBTQ descriptor or topic meta data tags, such as “LGBTQ life,” “LGBTQ issues” and “LGBTQ rights.” Said differently, inclusive content can include LGBTQ+ aspects without being strictly categorized in the LGBTQ+ genre.



English-language content accounts for more than 75% of LGBTQ+-inclusive programming

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SPOTLIGHT

LGBTQ+ content and audiences in the U.S.

In the U.S., Gracenote Inclusion Analytics identified the highest presence of LGBTQ+ talent on traditional cable networks during the last TV season, even though 43% of U.S. LGBTQ+ respondents say streaming movies and programs are more inclusive of their identities and experiences. While the U.S. leads in the production of inclusive LGBTQ+ content, audiences in the U.S. aren't solely focused on streaming content from their own country. U.S. households with same-sex spouses or partners spend a significant amount of time with programming acquired around the world.

From a production perspective, the U.S. leads in producing TV content that includes LGBTQ+ themes and storylines[1]. Not only does the production satiate audiences seeking representative content, but the content that is ad-supported provides brands with a medium to engage with consumers who are open to brands being inclusive based on sexual orientation and gender. Given the dominant role that the U.S. has in producing representative content and casting LGBTQ+ talent, any shift in the country's policy environment that inhibit production of this programming wouldn't just affect U.S. audiences. It could have a ripple effect around the world.

Increased inclusion could lead to increased loyalty among consumers, as a 2021 Nielsen identity and representation study found that more than 40% of respondents are more likely to buy products from brands that advertise within content that features someone from their identity group.

40%

of respondents are more likely to buy products from brands that advertise within inclusive content

Source: Nielsen Attitudes on Representation on TV Survey, May 2021

Top 10 acquired programs among households led by same-sex couples

Persons 2+ by streaming minutes in Q1 2022

Program	Original airing provider	Country	Q1 2022 viewing minutes
Schitt's Creek	CBC	Canada	110,573,825
Downton Abbey	ITV	U.K.	78,033,389
Wentworth	Foxtel AQ	Australia	34,468,536
Keeping Up Appearances	BBC One	U.K.	33,752,484
Peppa Pig	Channel 5	U.K.	28,611,814
Death in Paradise	BBC One	U.K.	24,506,010
Octonauts	CBeebies	U.K.	17,898,648
Merlin	BBC One	U.K.	17,271,360
Heartland	CBC	Canada	17,164,625
Naruto	TV Tokyo	Japan	16,391,264

Source: Nielsen Streaming Content Ratings and Nielsen National TV Panel

[1] Gracenote Studio System

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LGBTQ+ inclusion in media largely focuses on same-sex relationships

As with many identity groups, the LGBTQ+ population is very diverse. The community has also expanded since the "LGBT" initialism took form in the 1990s for lesbian, gay, bisexual and transgender. Over time, the letters have grown to embrace a much wider range of identities in the queer community spanning sexual orientation, gender identity and expression, as well as sex characteristics. This wide range of diversity is where the LGBTQ+ community believes inclusive content is lacking.

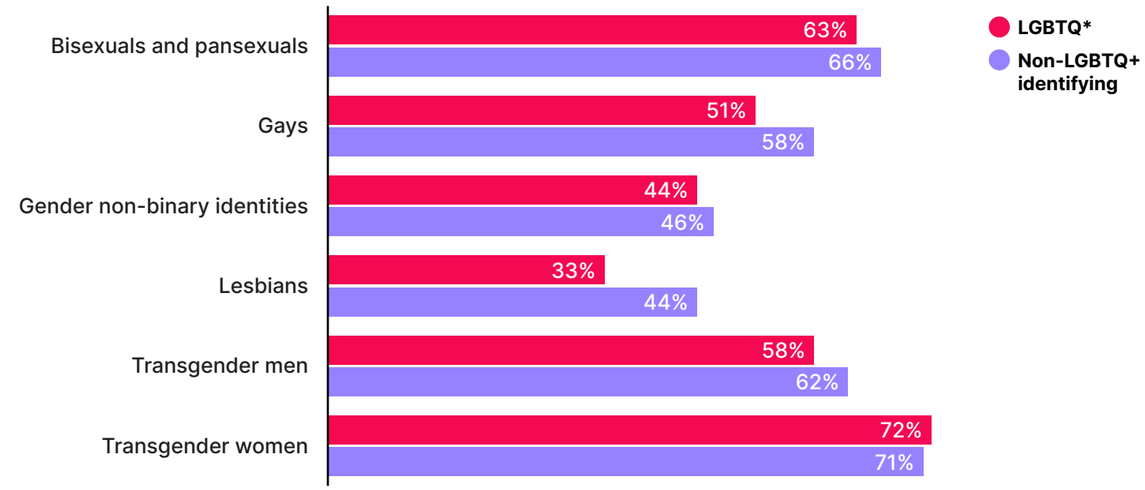
According to Nielsen's recent international LGBTQ+ inclusive media perceptions study, the community believes that content inclusive of same-sex relationships is alone in being broadly embraced. Comparatively, perceptions of inclusion about gender diversity, bisexuality and pansexuality are very low.

In 2020, many communities noticed a marked change in brands' commitment to inclusion through their marketing efforts in response to the global reckoning on racial injustice and treatment of marginalized communities. That point notwithstanding, much of that perspective stems from a low base, as perceptions of inclusion remain far from 100%, especially for groups that many people are far less familiar with, such as pansexual and gender fluid. It's also interesting to see how perceptions differ between members of the LGBTQ+ community and non-LGBTQ+ identifying people.

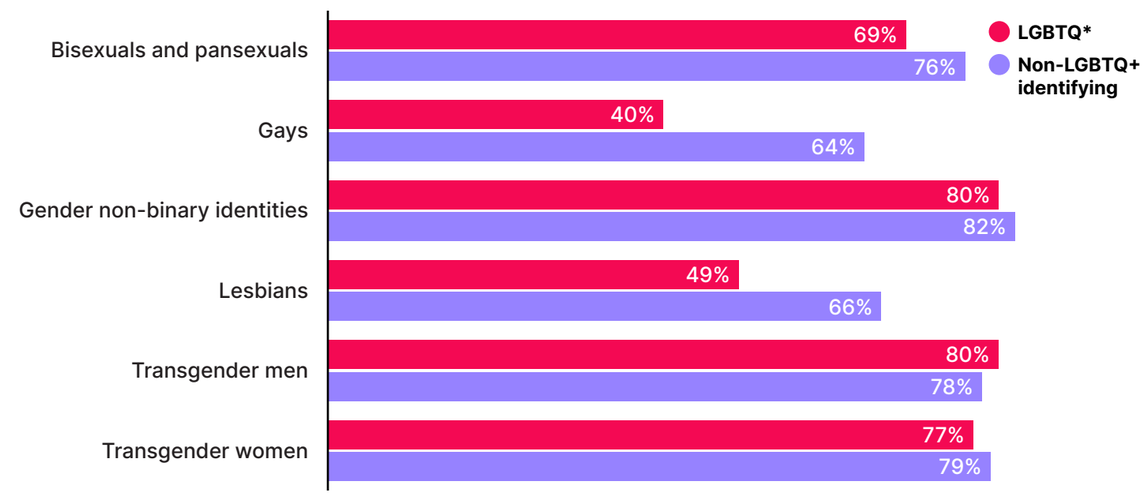
The U.S. LGBTQ+ community has the highest perception of inclusivity in advertising

About half of lesbians, for example, believe advertising is very non-inclusive when it comes to their identity group. Comparatively, two-thirds of people who do not identify as LGBTQ+ believe advertising is very non-inclusive of lesbians. The big takeaway here is that in many cases, people outside of the LGBTQ+ community, because they are less exposed to LGBTQ+ ads, often perceive that there is lower inclusivity in advertising compared to people who do identify as LGBTQ+. The gap is significant, especially for gays and lesbians. The data shows that some LGBTQ+ audiences already see the benefits of more inclusive content and advertising delivered on preferred digital channels that allow for more acute targeting, but viewers outside these targeted channels do not always see the progress. Inclusive content and campaigns can serve the communities they represent as well as broader audiences.

International perceptions that programming is non-inclusive



International perceptions that advertising is non-inclusive



*LGBTQ includes respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure. Non-LGBTQ+ identifying represents respondents who did not identify as a part of the LGBTQ+ community.

Percentages represent the number of respondents who replied "very non-inclusive."

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

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Perceptions about inclusion vary widely

From a global perspective, the LGBTQ+ community in the U.S. believes that advertising is more inclusive of most sexual orientations, particularly those who identify as gay, than in other countries. Consumers in Mexico also have a high perception that portrayals of gay people in advertising are inclusive. Comparatively, perceptions are notably lower in France.

Country-level perceptions of inclusivity in advertising by identity group

The numbers represent responses to this question: How inclusive do you think advertising is for each of the following LGBTQ+ identities, with 10 being the most inclusive?

*LGBTQ includes respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure. Non-LGBTQ+ identifying represents respondents who did not identify as a part of the LGBTQ+ community.

**Nine countries were included in the study.

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

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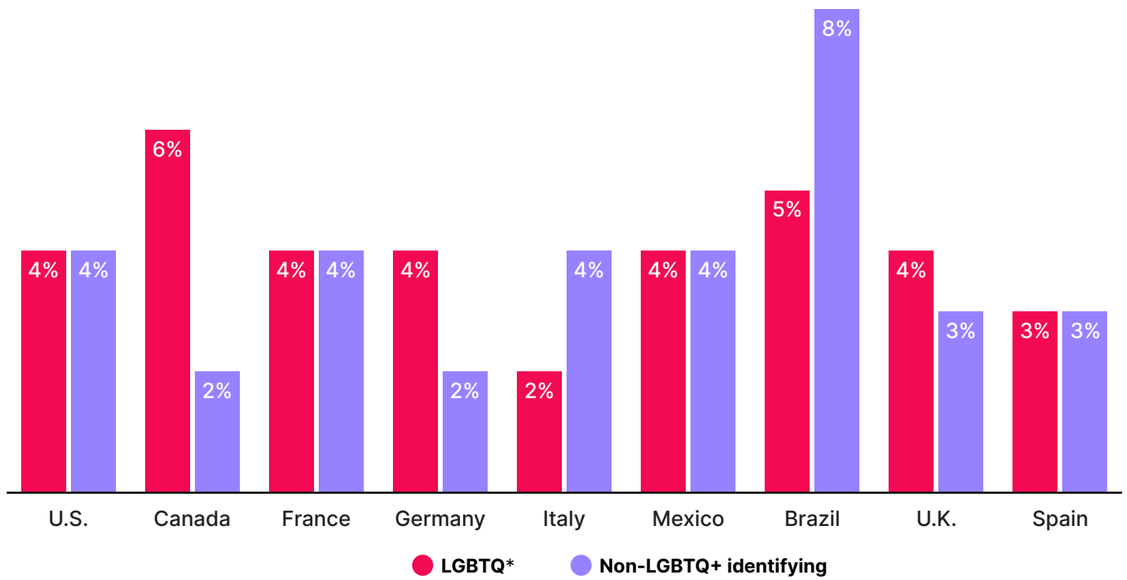
On average, 69% of international LGBTQ+ audiences say they believe efforts are being made to improve inclusion in media, but there are markets where consumers feel inclusion is either stagnating or even declining. Across the nine markets studied, 27% of all respondents believe the level of inclusion has not changed, while 6% of LGBTQ+ respondents in Canada and 5% in Brazil perceive reduced inclusion over the past two years. In Brazil, perceived inclusion has dropped even more among the general population.

Perceptions of declining LGBTQ+ inclusion in media



Percentages represent responses of "much" and a "little less" with respect to perceived inclusivity over the past two years.

*LGBTQ includes respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure. Non-LGBTQ+ identifying represents respondents who did not identify as a part of the LGBTQ+ community.

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

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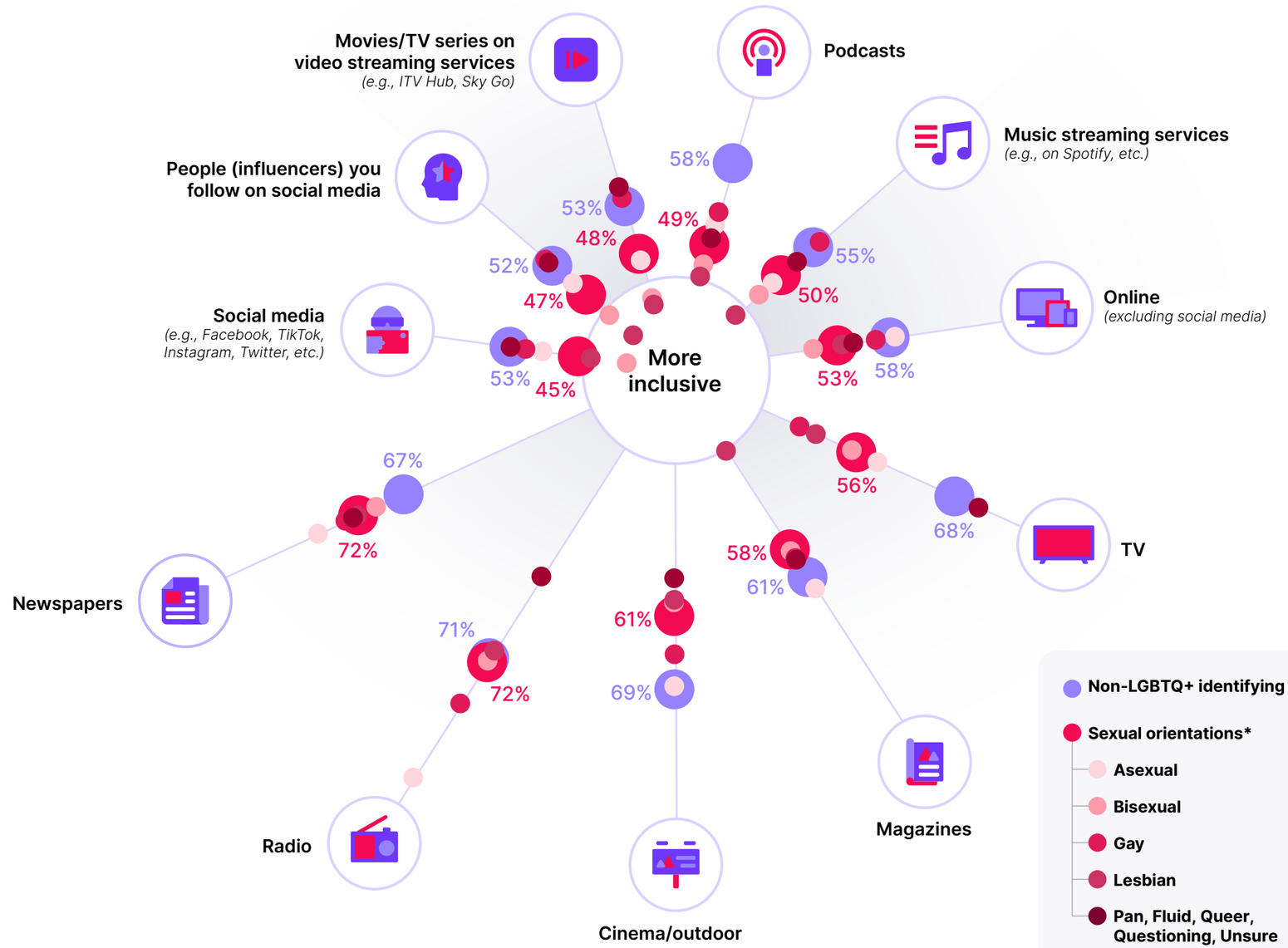
Not surprisingly, newer marketing channels, such as social media, rank higher than traditional ones for LGBTQ+ inclusion. But the gap between perceptions of LGBTQ+ people and those who are not is much smaller for individual ad types than it is for the ad industry overall. For example, 73% of gay people view newspaper ads as very non-inclusive, compared with 67% of non-LGBTQ+ identifying people. Inclusive media and advertising can be a tool for change and can humanize and normalize diverse community experiences, especially when audiences outside of the target community group are exposed to inclusive themes.

Perceptions of sexual orientation inclusivity in ads by advertising channel

Read as: 68% of people who do not identify as LGBTQ+ believe TV advertising is very non-inclusive of other sexual orientations.

Click the media icons below for additional data points.



*Sexual orientations represented include respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure. Non-LGBTQ+ identifying represents respondents who did not identify as a part of the LGBTQ+ community.

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

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LGBTQ+ representation remains incomplete

In aggregate, the LGBTQ+ community's perception indicates that current media portrayals offer an incomplete view of LGBTQ+ identities and experiences. Overall, inclusion is improving, but that inclusion focuses mostly on gay and lesbian identities, leaving many vastly underrepresented.

For example, Rebecca Creager conducted a study[2] in 2019 that analyzed various Netflix programs by applying scripting theory, which lends focus to the importance of social scripts in society. The theory includes two levels: the front stage and the backstage. The front stage involves the actions shown in public for others to see, and the backstage centers on actions behind the scenes to develop an identity. Creager's research cites that current media portrayals offer an incomplete view of queer lifestyles, largely the "front stage" aspect of scripting theory. Her research also found that TV programs "shy away from using any controversial or problematic depictions so as not to offend and offer as 'normal' of a TV experience as possible." As a result, youth see an incomplete view of LGBTQ+ experiences in media. Despite this, the way younger generations define "normal" is shifting dramatically, as Gen Z represents one of the most diverse cohorts in the U.S. In addition to being the most racially and ethnically diverse generation, Gallup estimates one in five identify as lesbian, gay, bisexual or transgender.

Overall inclusion is improving but many identities are left underrepresented

[2] Creager, Rebecca. 2019. "Sexual Scripting Through Netflix: LGBT Representation in Film."

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In addition to noting an incomplete view of the whole community, consumers surveyed for our international LGBTQ+ inclusive media perceptions study have strong views about the need for authenticity in media and the abandonment of stereotyping. Across all groups, including those who do not identify as LGBTQ+, avoidance of stereotyping is the No. 1 way to improve inclusion in content, followed closely by the need for more authenticity and realism.

Power of LGBTQ+ influencers

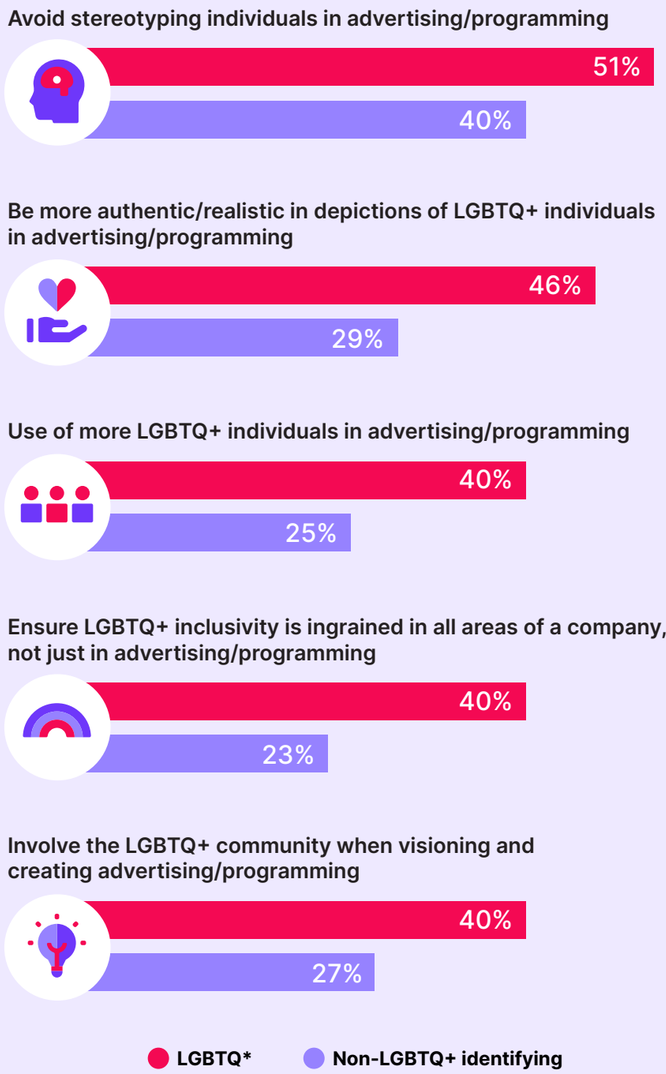
Model, vlogger, makeup artist, writer and actress **Victoria Volkova** is Mexico's top LGBTQ+ influencer*. She identifies as a transgender woman and made the list of *Forbes* Most Powerful Women in 2018 for her activism for LGBTQ+ rights. "We need more programs to educate people and let them know that there is not just one type of family, nor just two genders," she explained. Volkova made global headlines in 2020 when she became the first transwoman on the cover of *Playboy Mexico*. Several global brands like Motorola, Levi's, Avon and *Elle* have embraced her influence to market their brands in Mexico.

Brazil's top LGBTQ+ influencer* **Linn da Quebrada** was featured in *Vogue Brazil*'s first LGBTQ+ cover feature in June 2021. A transgender rapper, she uses her groundbreaking music (a mix of funk carioca and hip-hop) to amplify her activism for the queer and transgender community in Brazil. She fights for important LGBTQ+ issues such as being called the right pronoun (she has a forehead tattoo with the word SHE) and most recently partnered with Absolut Vodka in an outdoor marketing campaign.

*Based on Nielsen InfluenceScope data.

Ways to improve LGBTQ+ inclusion in media

Read as: 46% of the LGBTQ+ community believes improved authenticity will help improve inclusivity in content and advertising.



*LGBTQ includes respondents who identify as bisexual, gay, lesbian, pan, fluid, queer, questioning, and unsure. Non-LGBTQ+ identifying represents respondents who did not identify as a part of the LGBTQ+ community.

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

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Reading it right: The book industry is breaking barriers

While the media industry continues to reflect increasingly diverse populations, book publishing is driving more noticeable progress. In addition to NPD Bookscan reporting a 740% increase in sales of the LGBTQ+ genre over the last five years, *The New York Times* recently reported on the widespread support and promotion of the genre from the biggest publishers and retailers, including Walmart and Barnes & Noble.

The growth speaks to an established appetite, and publishers and retailers are acting in opposition to the efforts to suppress themes about LGBTQ+ life aimed at children and young adults. In 2021, for example, attempts to ban books in the U.S. reached their highest level since the American Library Association began tracking challenges more than 20 years ago.

Among the influences driving book sales, including those from niche genres, social media has grown into a significant force. The #BookTok community, for example, has become exponentially significant for authors and publishers. According to BookTokker Kevin Norman, "BookTok can reach a wider audience than any other social media platform, and it's amazing at separating us into niches."

For the LGBTQ+ community, books provide many people with the inclusive stories they're looking for. In the U.S., for example, Nielsen Scarborough data highlights that LGBTQ+ adults aren't just more likely to have shopped in a bookstore; they're 43% more likely to have made a recent purchase in the past three months.

LGBTQ+ booklovers buy in to increased inclusion

Read as: People who identify as LGBTQ+ are 51% more likely to have shopped online at any bookstore in the past three months.

	Total	LGBTQ+
Shopped online at any bookstore in past 3 months	9%	13%
Shopped in-store at any bookstore in past 3 months	14%	19%
Made a purchase from any bookstore in past 3 months	13%	19%
Household has an eReader (Kindle, Nook, etc.)	19%	19%

Source: Nielsen Scarborough USA+, Release 2, 2021

Current trends in the book industry buck the legacy assumption that readers of books with LGBTQ+ narratives or by LGBTQ+ authors, for example, would exclusively appeal to people in the community. Today's publishers are catering to readers who identify as LGBTQ+ and engaging readers beyond the community. As readers rally around inclusive and authentic stories, titles like Casey McQuiston's *One Last Stop* are hitting *The New York Times'* best seller list.

The trend aligns with findings from last year's Nielsen identity and representation study, which found that 87% of respondents are interested in content featuring people from outside their own identity group. That is the essence of an inclusive environment.

87%

of respondents are interested in content featuring people from outside their own identity group

Source: Nielsen Attitudes on Representation on TV Survey, May 2021

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Inclusive media can influence progress

Representation and equality remain worldwide goals, and countries around the globe are making strides to broaden the scope of inclusion across the media landscape. Change won't happen overnight, but signals suggest progress is happening—albeit at varied paces for different groups. For the LGBTQ+ community, acceptance and equality are long overdue, with specific challenges very much in the foreground.

Through inclusive narratives, authentic characters and new opportunities for LGBTQ+ community creators and leaders, the media industry can better reflect the vast diversity within the LGBTQ+ population. Compared with ethnic and multicultural communities, however, the LGBTQ+ community has largely gained ground through narratives limited to certain segments of the queer community, which falls very short of true representation for a global population that is very diverse in and of itself. By understanding the nuances within the diverse spectrum of LGBTQ+ consumers and amplifying content that authentically represents those experiences, the media industry can play an active role to ensure positive change continues.

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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 survey
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 May 2021.

Nielsen Scarborough
Nielsen Scarborough USA+ 2021 Release 2 (June 2020 - November 2021). Scarborough measures the unique shopping patterns, product usage, demographics, lifestyles and cross-media behaviors of the American consumer at a local, regional and national level, giving the ability to profile over 2,000 measured categories and brands.

Television methodology
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.

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

Nielsen Streaming Content Ratings
Nielsen Streaming Content Ratings uses people-powered panels and proprietary metering technology to deliver granular views of program and episode-level measurement on the top streaming platforms.

Nielsen InfluenceScope
InfluenceScope is the Nielsen Media one-stop solution to support marketers throughout the entire Influencer marketing lifecycle. From selecting creators for social media campaigns, to measuring the return and effectiveness of the influencer marketing activities, InfluenceScope always provides the most granular data-driven answers. Through in-depth research, Nielsen has determined four key dimensions to provide the most reliable and consistent criteria for a comprehensive assessment of every personality (reach, relevance, resonance and return). InfluenceScope is based on 20+ social media metrics, digital audience data and a database including +100 million influencers.

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