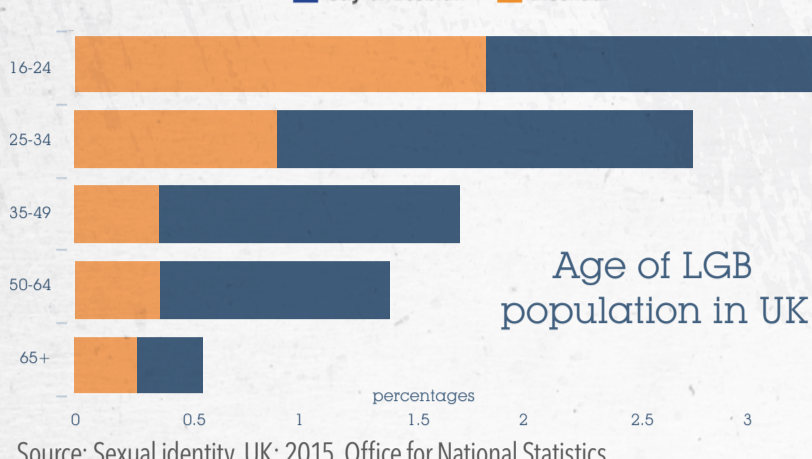


LGBT AUDIENCE IN THE UK AND SPORT

Lesbian, gay, bisexual and transgender people make up close to **6%** of the UK population. This translates to approximately 4m lesbian, gay and bisexual (LGBT) adults.*

Together, they spend more than **£80 billion annually**

LGBT Capital estimates LGBT-Wealth, the LGBT population's share of Global Household Wealth, to be **US \$50 trillion**



Source: Sexual identity, UK: 2015, Office for National Statistics

The largest percentage of LGBT in the UK are 16 to 24-year-olds at 3.3 per cent.

This may be associated with a young age structure or the ethnic diversity of the population of London.

The most common places for LGBT people to live was in Greater London, at 5.1%, Greater Manchester, at 3.6%, and Brighton and Hove, at 9.9%

London has the largest population that identifies as LGBT in the UK at 2.6%



CASE STUDY

- Has developed a close relationship with the LGBT community
- Advertises frequently in the gay press
- Invested in new product development to reflect their stance, such as their famous rainbow flag bottle

An LGBT audience have the potential to be a loyal and affluent consumer group for brands and typically have a higher than average disposable income.

Despite this, LGBT consumers are still hugely underrepresented in mainstream marketing campaigns

This sort of progressive attitude does not just resonate with LGBT consumers, but also consumers that are supportive of equal rights, particularly Millennials, and Gen Z (whose spending power is rapidly increasing)

47.7% Of millennials are more likely to support a brand after seeing an equality-themed advert

SPORT, FITNESS & THE LGBT POPULATION

There is a healthy appetite for participation in sport amongst LGBT population

- The LGBT population are 3x more likely to be in to fitness than base population
- LGBT people are 2x more likely to have a personal trainer or invest in paid weight management
- LGBT people are often early adopters of new ideas and technologies

42% of lesbians are members of sports club/ vs. 25% of gay men

59% of gay men are members of a gym or leisure centre/ vs. 44% lesbians



Rugby is now considered one of the most LGBT friendly sports, largely owing to leading rugby figures such as Gareth Thomas and Keegan Hirst coming out in public

Football is considered to have one of the most homophobic and transphobic cultures around it - 50% of football supporters have heard homophobic abuse at matches

8% of football fans would entirely stop watching their team if they signed an openly gay player



LGBT AND RIO 2016

Out of a record 53 openly LGBTI athletes, comprising of 11 men and 42 women, 19 of them won a medal solo or in a group

Over a third, 35%, of all out LGBTI athletes won medals during the Rio Olympics



If they competed together as Team LGBTI, they would have won five gold medals, six silver medals and three bronze medals

- The 'rainbow team' would have come 16th - beating countries such as Kenya, New Zealand and Canada
- Since 1928, more than 250 LGBTI Olympians have competed. Prior to Rio, 113 of them had won at least one medal. And of those, 44 have more than one
- Renée Sintenis, also of Germany, won bronze to become the first LGBTI Olympic medal winner in 1928. She won it in sculpting, when art used to be a part of the Games

BARRIERS TO PARTICIPATION IN SPORT

There are unique differences between lesbian, gay, bisexual and transgender communities when it comes to barriers encountered

- Almost half** of LGBT people that find the culture around sport either intimidating or unwelcoming
- 62%** have witnessed either homophobia or transphobia in sport
- 73%** of LGBT respondents think homophobia and transphobia are barriers to participation
- 57%** of LGBT respondents would be more likely to participate in sport if it were more LGBT friendly
- 3/5** of sports fans believe anti-gay abuse from fans dissuades gay professional players from coming out
- 1/4** LGBT people have negative experiences of sport in school



More than six in ten gay and bisexual men and four in ten lesbians and bisexual women expect to experience homophobia if they take part in a team sport or are open about their sexual orientation

“ The difficult thing with the trans community in sport - I think with the way it works, if you're a male transitioning into a female, you still sometimes have to compete in the male category? I think that's a little bit tough. ”

Tom Daley, Olympic Diver

“ I was living a lie. I've never hidden it within football circles because it is accepted, but to the outside world, I've never spoken about my sexuality. ”

Casey Stoney, Footballer, Liverpool

CASE STUDY



- Manchester United launched a club wide initiative in 2016 called **#allredequal**
- Welcomed players on to the pitch with a giant flag demonstrating Stonewall's quality work
- Players donned **#rainbowlaces** in support of the LGBT movement
- LGBT positive messages lit up advertising hoardings around the pitch

MISSED OPPORTUNITY FOR RETAILERS

There are only two retailers within Stonewall's Top 100 LGBT-friendly Employers; Asda and The Co-Operative Group

- Less than half** of the 16 retail organizations that were submitted in 2016 have anti-discrimination policies which address harassment based on someone's actual or perceived sexual orientation or gender identity
- 75%** of the population are more likely to think better of a brand if it is supportive of LGBT+ issues
- 31%** of those 16 retailers are training staff on basic equality legislation, such as the Equality Act 2010, which includes the provision of goods and services to lesbian, gay, bisexual and transgender people
- 70%** of the population are more likely to recommend brands that are supportive of LGBT+ community

LGBT consumers spend 7% more than non-LGBT consumers

LGBT households spend 35% more on online purchases than non-LGBT households

THOUGHT STARTERS

- Consider diversifying products offered e.g. engagement cards for mother and mother
- Encourage fundraising of local LGBT charities and show support at LGBT specific events such as Pride
- Consider stripping away negative differentiation by gender e.g. toy retailers
- Give further consideration to trans customers and attitudes towards designated changing rooms
- Further education for employees around appropriate responses in-store e.g. to not use 'gay' as a derogatory term, how to react if a complaint is made about a LGBT couple kissing or holding hands in store
- Seek advice from gay consumer groups before launching targeted campaigns and to strike the correct tone

Brands must be aware of **'pink-washing'** e.g. brands undertaking PR effort to appear LGBT friendly but not necessarily practicing what they preach.

Today's consumer is savvy and can easily identify when a campaign is simply a box-ticking exercise.

“ You have to make sure your employees and customers are being taken care of first. Otherwise, any marcomms that address them will feel like tokenism. ”

Jan Gooding, Group Brand Director, Aviva

There is an opportunity for brands to further consider LGBT culture in their marketing communications.

This will result in broadening their scope to access a wider audience, and setting themselves up for future success.



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