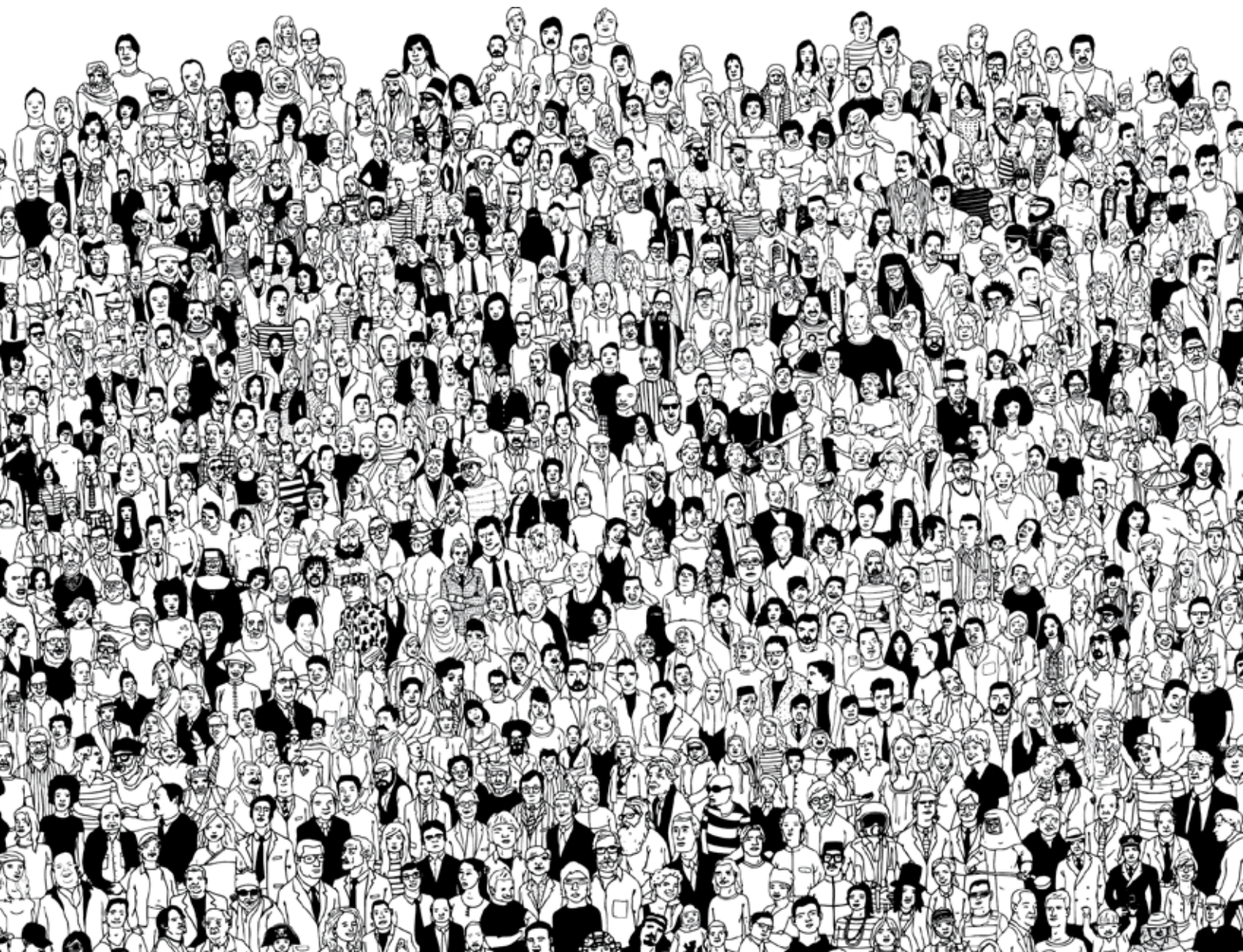


YouGov Omnibus: LGBT Report

YouGov[®]
What the world thinks



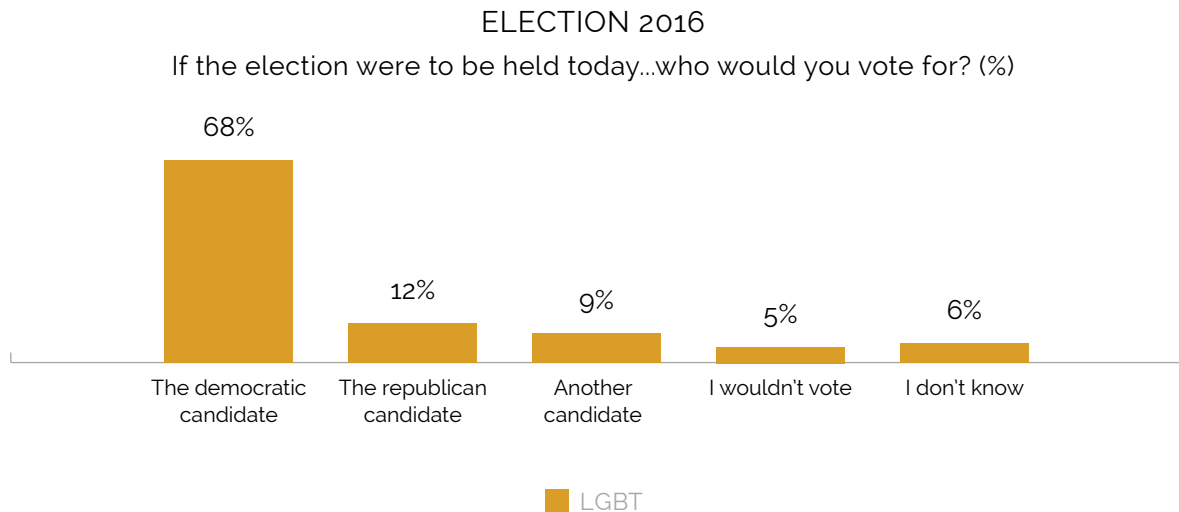
2016 LGBT Survey

YouGov LGBT Omnibus annual snapshot looks at the lesbian, gay, bisexual and transgender community's views and attitudes on politics, sexuality, branding and advertising and how their views compare to their heterosexual counterparts.

Politics

The year 2016 will be remembered for the Presidential Election and which candidate wins in November.

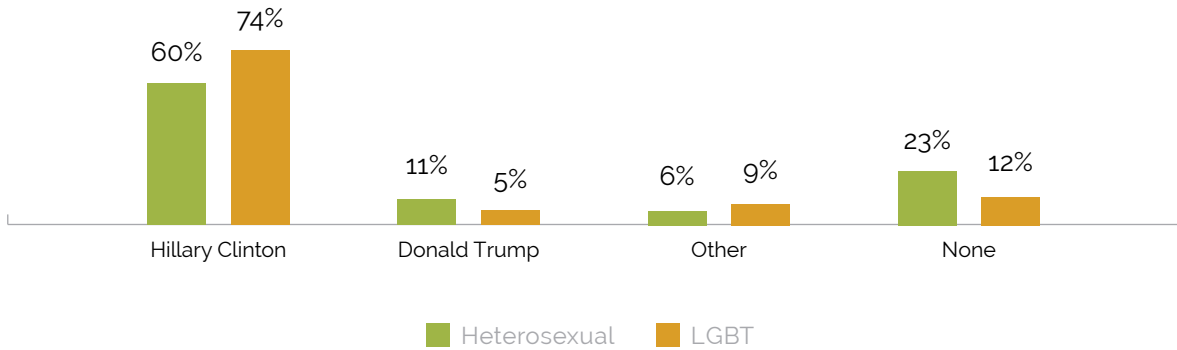
At this early stage of the campaign there is a clear favorite among lesbian, gay and bisexual (LGBT) adults. If an election were held on the day of this survey the overwhelming majority – 68% – of LGBT adults would vote for Hillary Clinton.



These results may be a factor of the prevailing perceptions on which candidate is most supportive of LGBT rights. 74% of LGBT and 62% of heterosexual adults indicated that they believed Hillary Clinton was the most supportive candidate. The election's expected outcome could also be a result of which candidates are perceived as being most proactive in campaigning to LGBT voters. On this measure, most people believe that candidate is Hillary Clinton (74% LGBT and 60% heterosexual).

THE LGBT CANDIDATE

Voter perceptions of which candidate is most proactive in campaigning to LGBT voters. (%)

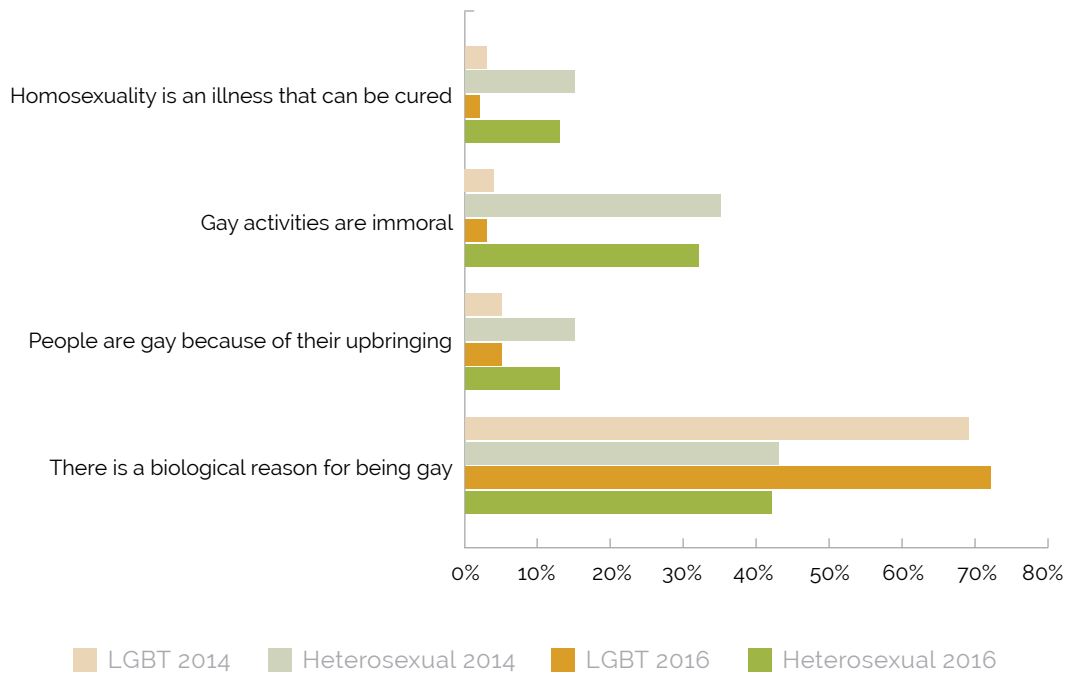


Sexuality and Morality

There continues to be a deep disparity between the heterosexual and LGBT populations about the underlying causes of sexual orientation and the morality of lesbian, gay and bisexual life. However, these disparities have lessened slightly since 2014.

32% of heterosexual adults believe that gay activities are immoral, compared to only 3% of LGBT adults.

ATTITUDES TOWARDS HOMOSEXUALITY (% AGREE)



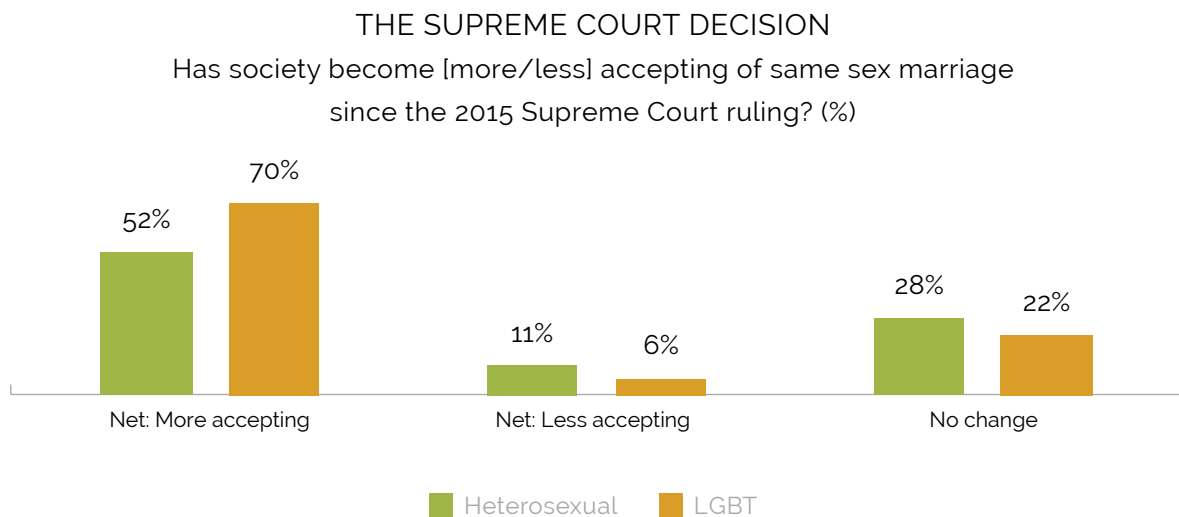
Almost three quarters, (72%) of LGBT adults think that there is a biological reason for people being gay, while 5% attribute being gay to a person's upbringing.

The heterosexual population, however, report markedly different responses – only 42% believe there is a biological reason for homosexuality. Proportionately more heterosexual adults than LGBT adults believe homosexuality has something to do with upbringing (13%), while the same proportion – 13% - believe that homosexuality is a curable illness.

Nine percent of those who report that they are heterosexual also report that they have had romantic or sexual feelings for someone of the same gender as themselves.

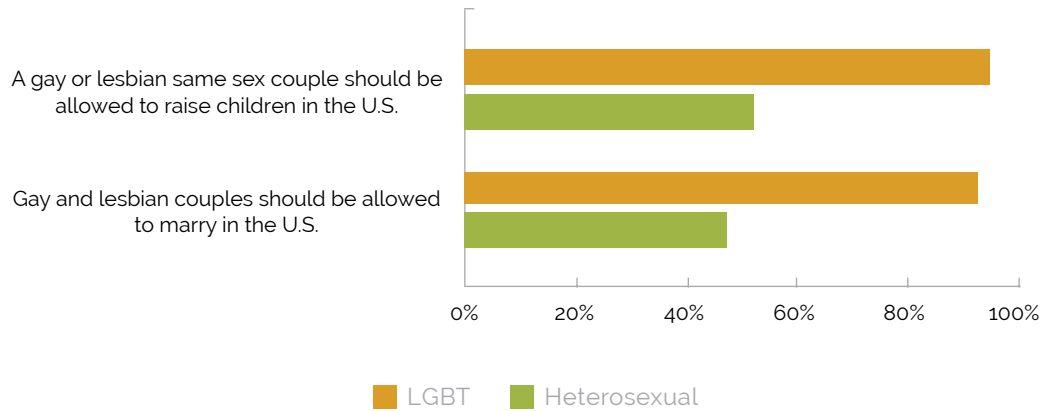
Gay Marriage

Last year the U.S. Supreme Court determined that the right to marry extended to same-sex couples in the U.S. It was a much publicized decision, and unsurprisingly appears to have had an impact on what society as a whole thinks of same-sex marriage. A majority of both LGBT (70%) and heterosexual (52%) adults say that society has become more accepting of same-sex marriage after the Court's decision. Only 11% of heterosexual and 6% of LGBT adults report that they feel society is now less accepting of gay marriage. Only 28% of heterosexual and 22% of LGBT adults report that they feel society is now less accepting of gay marriage.



In 2014, 45% of heterosexual adults thought that gay and lesbian couples should be allowed to marry in the U.S. That proportion has risen by 2 percentage points in the 2016 survey, to 47%. The number of heterosexual adults who think same-sex couples should be able to raise children has also risen from 49% in 2014, to 52% in 2016.

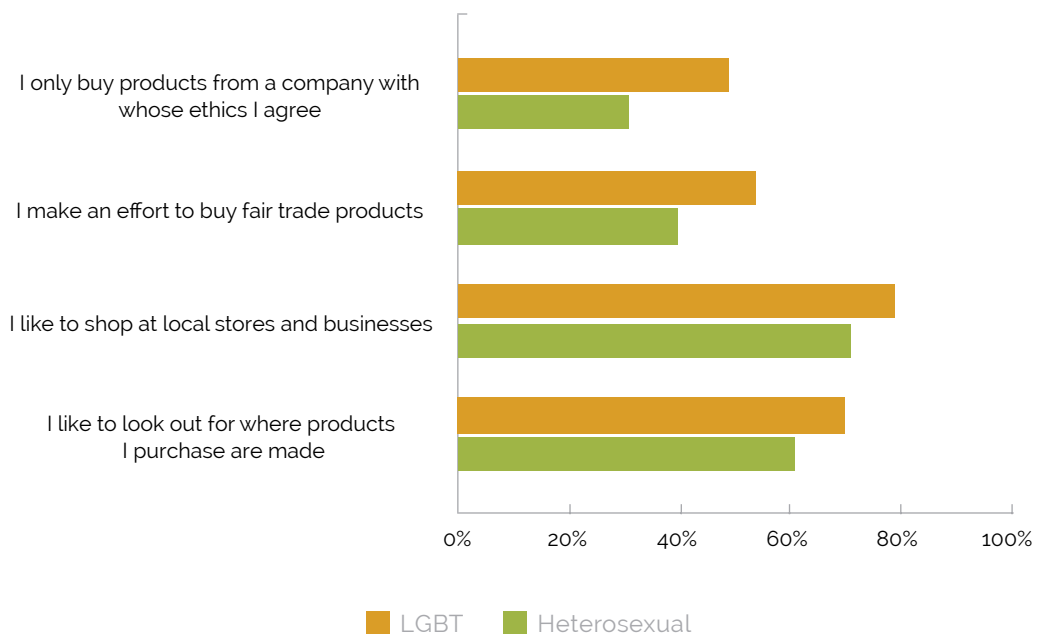
ATTITUDES TOWARDS GAY MARRIAGE



LGBT Consumers

The LGBT community appears to have a much stronger commitment to ethical trade than heterosexual consumers. 70% and 61% of LGBT and heterosexual adults respectively, report that they like to look for products' origins before buying them; 79% and 71% agree that they like to shop in local stores; 54% and 40% agree that they make an effort to buy fair trade produce; and, 49% and 31% agree that they only buy products from a company whose ethics they agree with.

ATTITUDES TOWARDS ETHICAL SHOPPING



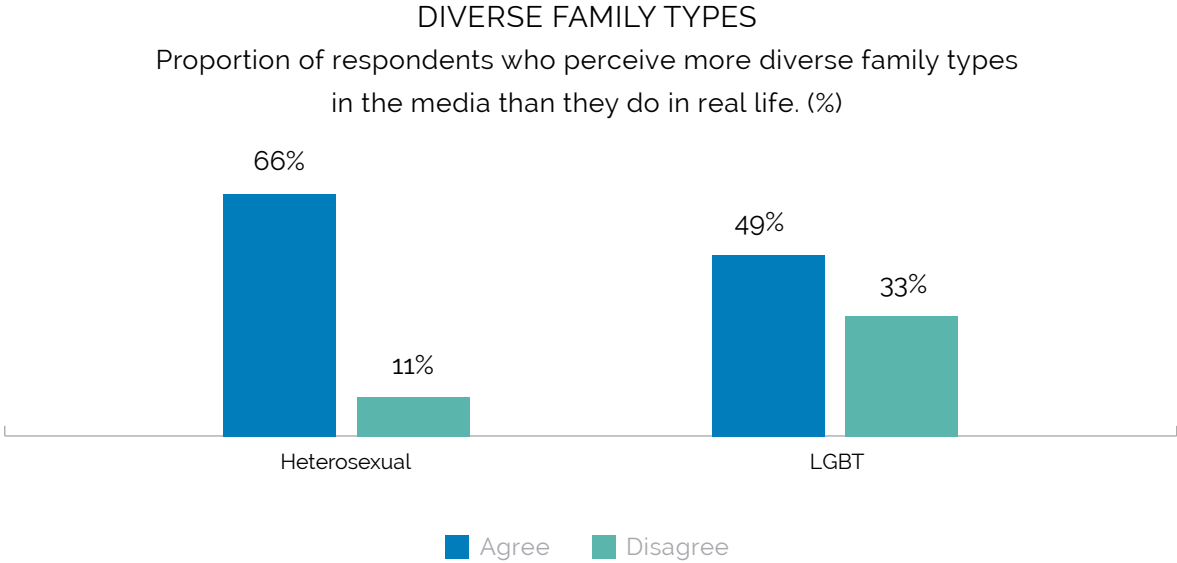
In The Media

The days of the traditional family structure (a married man and wife with children) dominating American society are over. Only 6% of LGBT and 5% of heterosexual adults believe that family structures have not changed at all in the last ten years. Americans believe that family types are diversifying, with more same sex couples having children, more children being born outside of marriage and more single parent families being apparent to all. (LGBT 83%, 73%, 73% and heterosexual 69%, 74%, 74%)

However, there is still a big divide between LGBT and heterosexual adults in terms of whether they think these changes are good or bad for society. Asked whether these changes' impact are good or bad, for society as a whole LGBT adults are split - 60% good, 20% bad. Heterosexual adults are split the other way 24% good, 51% bad.

These attitudinal differences carry through to views about the use of modern family types in the media. LGBT adults overwhelmingly want to see more diverse family types represented in the media (76% agree they want more, 7% disagree), while only 31% of heterosexual adults do - 35% do not want more.

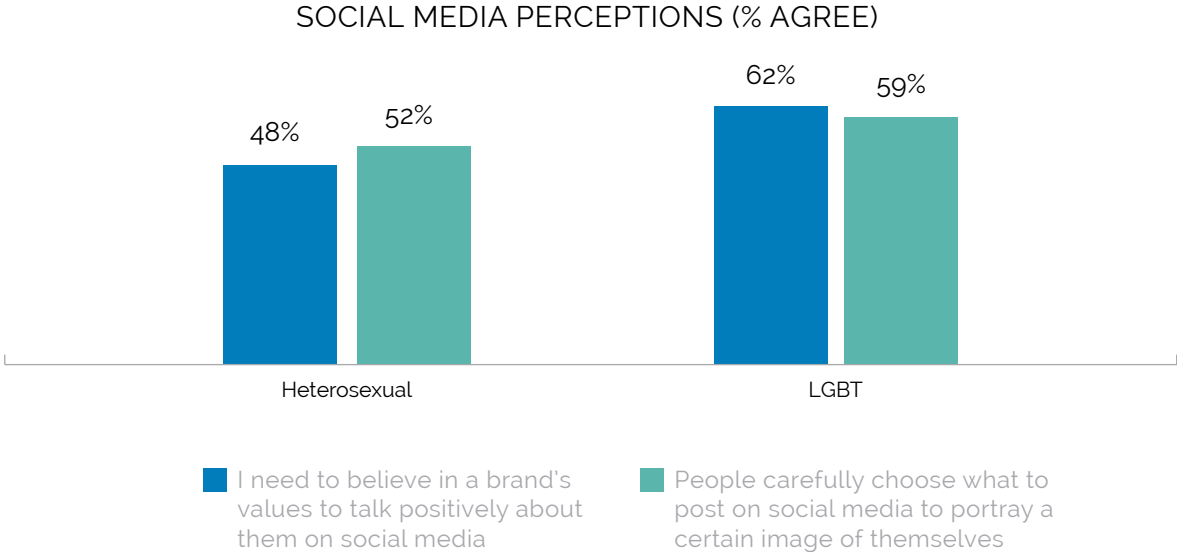
Interestingly, more heterosexual and LGBT adults believe diverse family types are overrepresented in the media than do not.



Brands

Both LGBT and heterosexual adults are fairly consistent in their approach to brands and advertising. Proportionately more adults want brands to take stands on social issues than don't want them to (73% LGBT adults want brands to 39% of heterosexuals). However, both groups tend to be cynical of those brands that do. 67% of LGBT adults and 62% of heterosexual adults believe that brands tend to claim to support causes that are popular, regardless of whether they are making an authentic commitment to that cause.

This finding has implications for brands looking for endorsement from their customers on social media, especially for those with a strong LGBT customer base. Americans need to believe in a brand's values in order to talk positively about them on social media, with 62% of LGBT and 48% of heterosexual adults agreeing with that idea. Large proportions of adults (59% of LGBT adults and 52% of heterosexual) reported that individual people choose what they post to social media carefully in order to portray a certain image of themselves. Searching for an authentic way for a brand to express its values appears to be a major challenge in encouraging social media posts by customers.



Advertising

Diverse family types appeal more to LGBT consumers; 59% of LGBT adults are more likely to purchase a brand's products if they used diverse family types in their advertising, and 61% state the same if LGBT friendly themes were used. In contrast only 20% of heterosexual adults are more likely to purchase products advertised with diverse family types, with 18% less likely to.

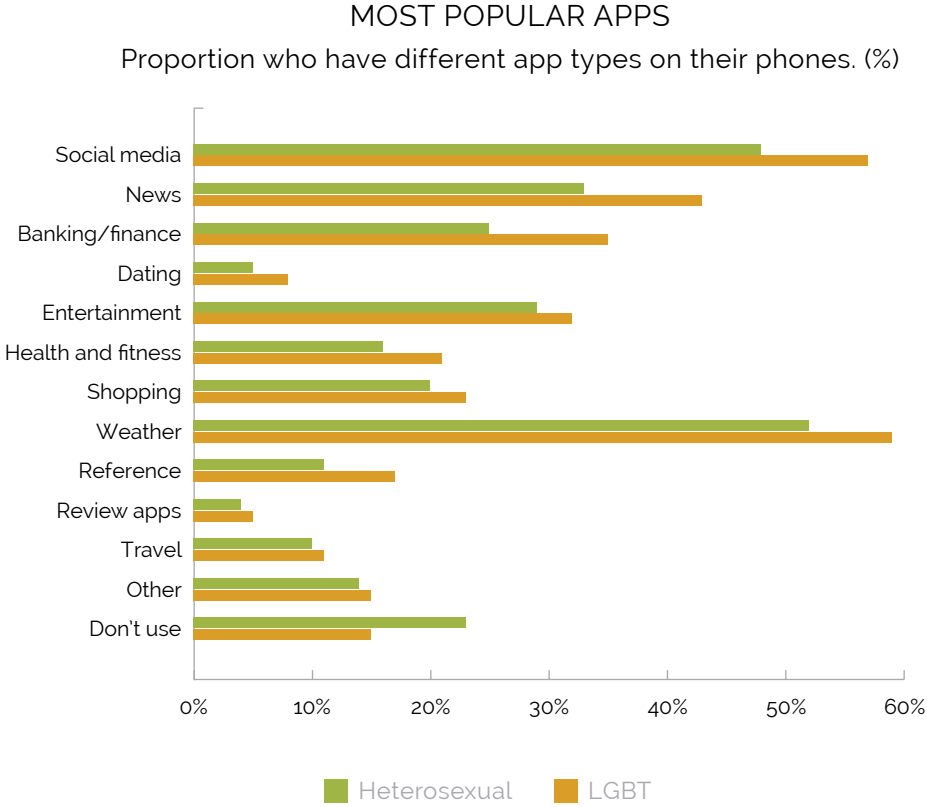
For the majority of heterosexual adults – 63% – using diverse family types makes no difference to product purchase. Those figures are lower when LGBT friendly themes are considered with 33% of heterosexual adults less likely to make a purchase. LGBT friendly themes make no difference in purchase likelihood to 55% of heterosexual adult's purchase decisions.

38% of LGBT and 16% of heterosexual adults would be more likely to share messages from brands on social media if they used diverse family types in their advertising, though 20% of heterosexual adults would be less likely to (compared to 6% of LGBT adults). The proportions fall for heterosexual adults when advertising uses LGBT themes. Only 16% are more likely to talk about a brand's advertising, while 35% are less likely, and only 10% are more likely to share brand messages on social media, while 34% are less likely.

Depending on the audience, there can be a benefit to brands using diverse family types in advertising in terms of customers feeling more positive about the brand in general, with 69% of LGBT and 28% of heterosexual adults stating that they would be more likely to feel more positive about the brand in general (19% of heterosexual adults would be less likely to feel positive). When asked about explicit LGBT themes, however, while 70% of LGBT respondents reported they would be more likely to feel more positive about the brand in general, 18% of heterosexual adults reported the same. 33% of heterosexual adults they would be less likely to feel positive about the brand in question (with only 3% of LGBT adults feeling this way).

Social Media and Apps

LGBT adults tend to be more active on their apps and social media compared to heterosexual adults. That increased activity is noted across all app types, and reinforced by a larger proportion of heterosexual people reporting that they don't use apps every day.



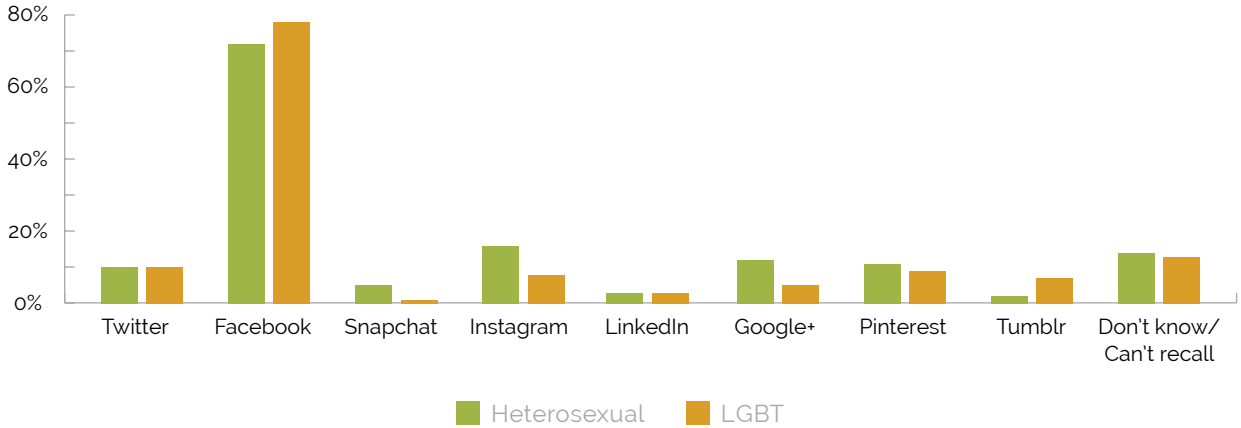
LGBT respondents consistently reported higher membership rates of social media platforms than heterosexual adults. The most popular social media site is Facebook, with 83% of LGBT and 76% of heterosexual adults using Facebook. Twitter is about half as popular (with 44% and 35% respectively reporting membership). Instagram is half as popular again, with 28% and 21% of LGBT and heterosexual adults reporting that they have Instagram profiles.

Facebook Messenger appears to be the most widely used platform for direct communication, being the most frequently and widely used communications app – 14% of LGBT and 11% of heterosexual adults use it every day. Its usage is significantly greater than other popular apps, such as WhatsApp, Skype and WeChat. Skype came in as the second most used communications app with 2% LGBT and 2% heterosexual using it daily. There was almost no difference in the frequency and types of communication apps used between heterosexual and LGBT adults.

LGBT Adults More Responsive to Social Advertising

More LGBT adults (28%) than heterosexual adults (20%) have made a purchase based on advertising they have seen on social media. Of those for whom a social media ad led to a purchase, Facebook scores highest, with 78% of LGBT adults and 72% of heterosexual adults reporting that they have made a purchase based on an advertisement they have seen on Facebook. For LGBT adults, Twitter is the next most common social media platform they report making a purchase from advertising – with 10% of respondents reporting a purchase. Intriguingly 10% of heterosexual adults also cite Twitter advertisements as leading to a purchase, but Instagram (16%), Google+ (12%) and Pinterest (11%), were all more popular platforms for advertising to lead to a purchase for heterosexual respondents who have ever done so.

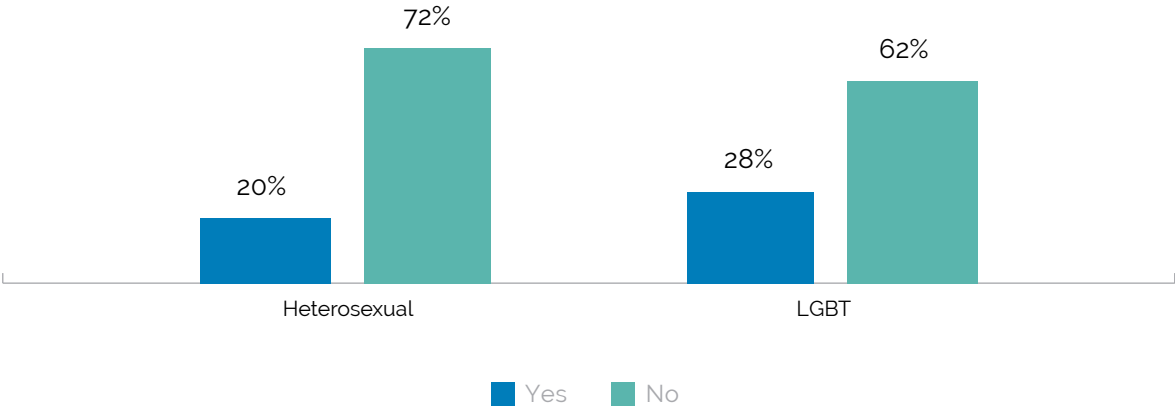
POPULAR SOCIAL MEDIA PLATFORMS
Proportion of responders who use different social media platforms. (%)



The greater activity noted of LGBT adults on social media platforms and apps apparently feeds through to purchase decisions made on advertising on social media platforms. LGBT adults are more likely than their heterosexual counterparts to make a purchase based on social media advertising.

MAKING PURCHASES

Proportion of adults reporting making a purchase based on social media advertising. (%)



YouGov LGBT Omnibus

YouGov LGBT Omnibus research provides a comparative snapshot of LGBT and Heterosexual views on political, social, and marketing issues. Using a valid LGBT sample, which can be fully segmented by self-identified Gay, Lesbian, Bisexual and Transgender responders, researchers now have a fast and cost effective way to test opinions and craft messaging suitable to this increasingly affluent and vocal audience. All YouGov research is conducted online, with the benefits of responder anonymity and privacy, enabling responders to share their thoughts and experiences openly without needing to interact with a telephone researcher. YouGov's US LGBT panel is weighted to academic population estimates of comparative portions of lesbian, gay and bisexual men and women in the US. More details can be provided on request.

Notes on Method

LGBT Survey: Total sample size was 993 LGBT adults. Fieldwork was undertaken between 14th - 15th June 2016. The survey was carried out online. The figures have been weighted and are representative of all US LGBT adults (aged 18+). Heterosexual survey: Total sample size was 1041 heterosexual adults. Fieldwork was undertaken between 14th - 15th June 2016. The survey was carried out online. The figures have been weighted and are representative of all US heterosexual adults (aged 18+).

Contact

For more information, contact Anne Gammon: anne.gammon@yougov.com