



Numerator

NEW FRONTIERS

Engaging the **LGBTQ+** community

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The LGBTQ+ community continues to 'come out' – and marketers are taking notice

3,722 views | Aug 14, 2018, 07:45am

Forbes

The \$1 Trillion Marketing Executives Are Ignoring



John Schneider and David Auten Contributor ⓘ
Personal Finance
Cashing in on fabulous with queer money.

AMERICA'S LGBT ECONOMY
The Premiere Report on the Impact of LGBT-Owned Businesses

- Contributing Over \$1.7 Trillion to the U.S. Economy
- Creating Good Jobs & Innovating Industries
- Building Wealth & Expanding Diversity in the LGBT Community

The LGBT Economy Is America's Future



esbian Chamber of Commerce

We have a lot more power than we think we do. Now's the time to use it.



An opt-in micro-survey was used to identify the LGBTQ+ consumer via our apps

LGBTQ+ classification

Which of the following best represents how you think of yourself?

- Straight
- Gay or Lesbian
- Bisexual
- Another identity not listed
- Prefer not to answer

Which of the following best represents how you think of yourself?

- Male
- Female
- Transman
- Transwoman
- Non-binary
- Another identity not listed
- Prefer not to answer

NET: Gay or Lesbian, Bisexual, Transman, Transwoman, Non-Binary, Another Identity



To date, we have
~5,000 HHs identifying
as **LGBTQ+**

The LBGTQ+ consumer is similar to many of us...
just trendier

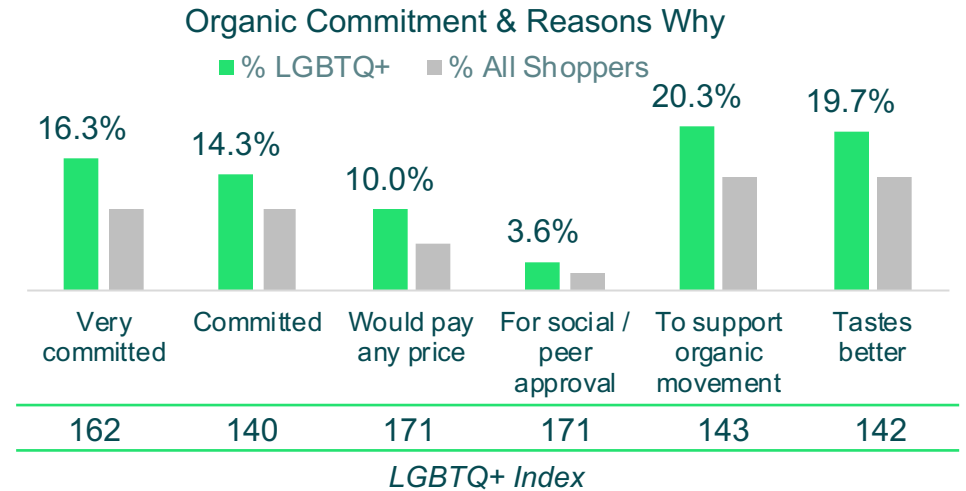
The LGBTQ+ community is committed to organics, willing to pay a premium, to support the movement, for social approval, & taste



HEALTH / SUSTAINABILITY:

ORGANIC COMMITMENT/ASSOCIATIONS

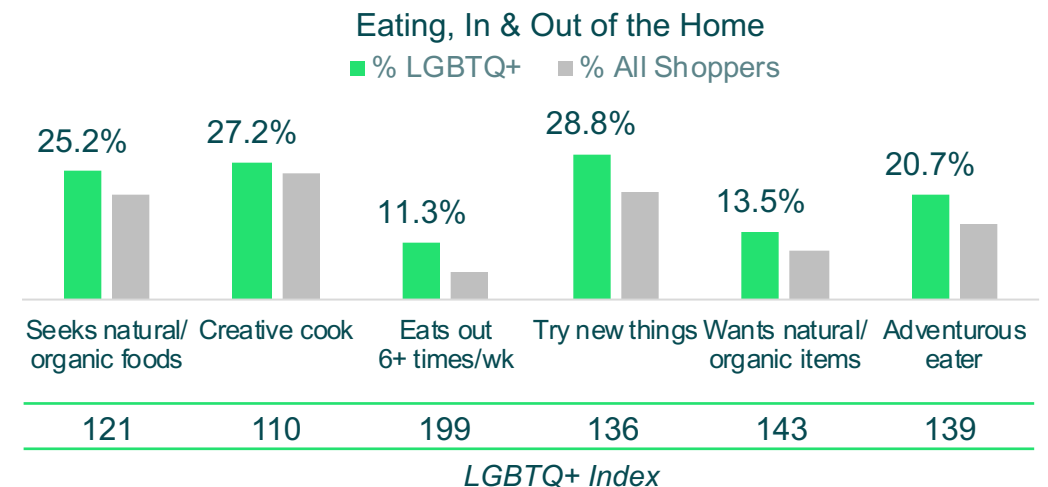
Very committed/committed & would pay more...but why? To Support the Organic Movement, for Social/Peer Approval, & Taste



EATING:

DINING IN COOKING/SHOPPING ATTITUDES, DINING OUT FREQUENCY & REASONS

Dining in or out, they're Creative Cooks/ Adventurous Eaters & Seek Natural/Organic Foods – they also Eat Out *very frequently* to Try New Things

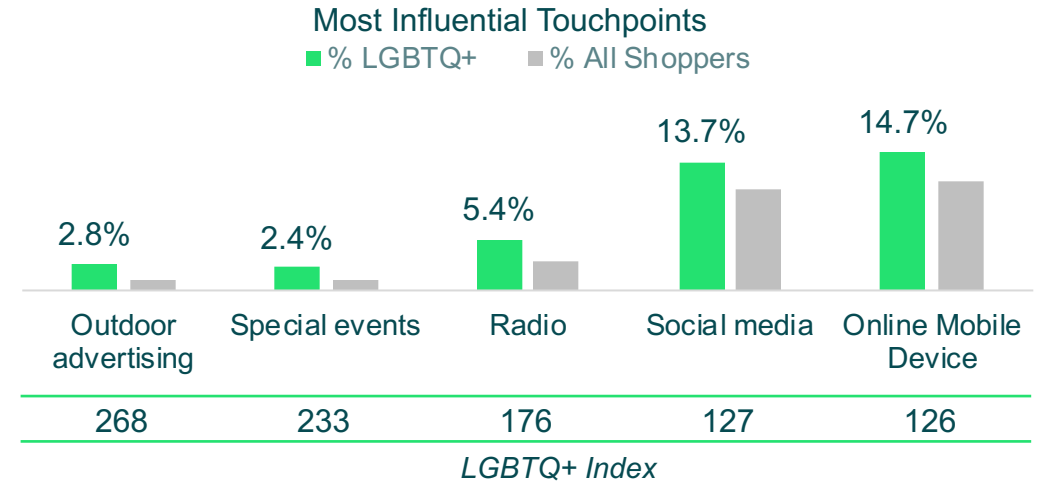


The best way to reach them is through outdoor advertising, special events (i.e. Pride), radio, social media, & mobile



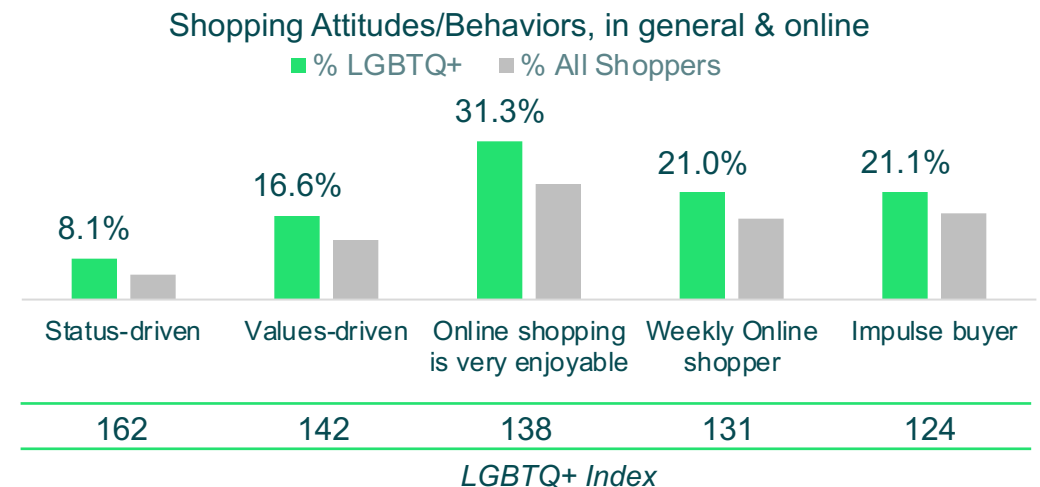
ADVERTISING:
MOST INFLUENTIAL TOUCHPOINTS

Outdoor Advertising, Special Events, Radio, Social Media, & Online Mobile



SHOPPING:
ONLINE & IN GENERAL

Weekly Online shopper (& really enjoys it!), Driven by Status & Values, & Impulse Buyers



In addition, the community is quite tech savvy, spending a lot of time on their devices & likely to use Dating & Lifestyle apps

Reach these shoppers with targeted communications on relevant mobile apps & social media sites



TECH ADOPTION / USAGE: ADOPTION & PC/MOBILE/TV USAGE

**Innovators, >8 hrs/day for
PC/Mobile/TV**

149 index, indices from 131-170



ONLINE / OFFLINE BEHAVIOR: LISTENING & READING

Podcasts, Read Newspaper (Digital)

139 index & 119 index



MOBILE APP BEHAVIOR: TYPES OF APPS

Dating, Lifestyle, Entertainment

310 index, 155 index, & 125 index



SOCIAL MEDIA: BEHAVIORS & PLATFORMS

Make New Friends, Product Reviews

196 index & 154 index

Snapchat, Twitter, Tumblr, Reddit

Indices: 138, 132, 458, 224

From a broad perspective, the community spends nearly the same as the rest of the US, but they make more trips online



LGBTQ+ community

Overall

\$8,695

Spent per year

(\$110 less than rest of US)

266 trips per year

(1.3 more than rest of US)

\$33 per trip

(\$2.50 less than rest of US)

Online

\$1,725

Spent per year online

(\$2 less than rest of US)

49 trips per year online

(4.5 more than rest of US)

\$35 per online trip

(\$4.30 less than rest of US)

LGBTQ+ consumers are more likely to shop natural/urban outlets in general – but head to Sephora, Amazon, & Target for Health/Beauty

When shopping for groceries, LGBTQ+ spend more at natural outlets / those more likely to be in urban areas

Key Grocery Retailer Spend Index:
LGBTQ+ vs. All Other Shoppers



137



137



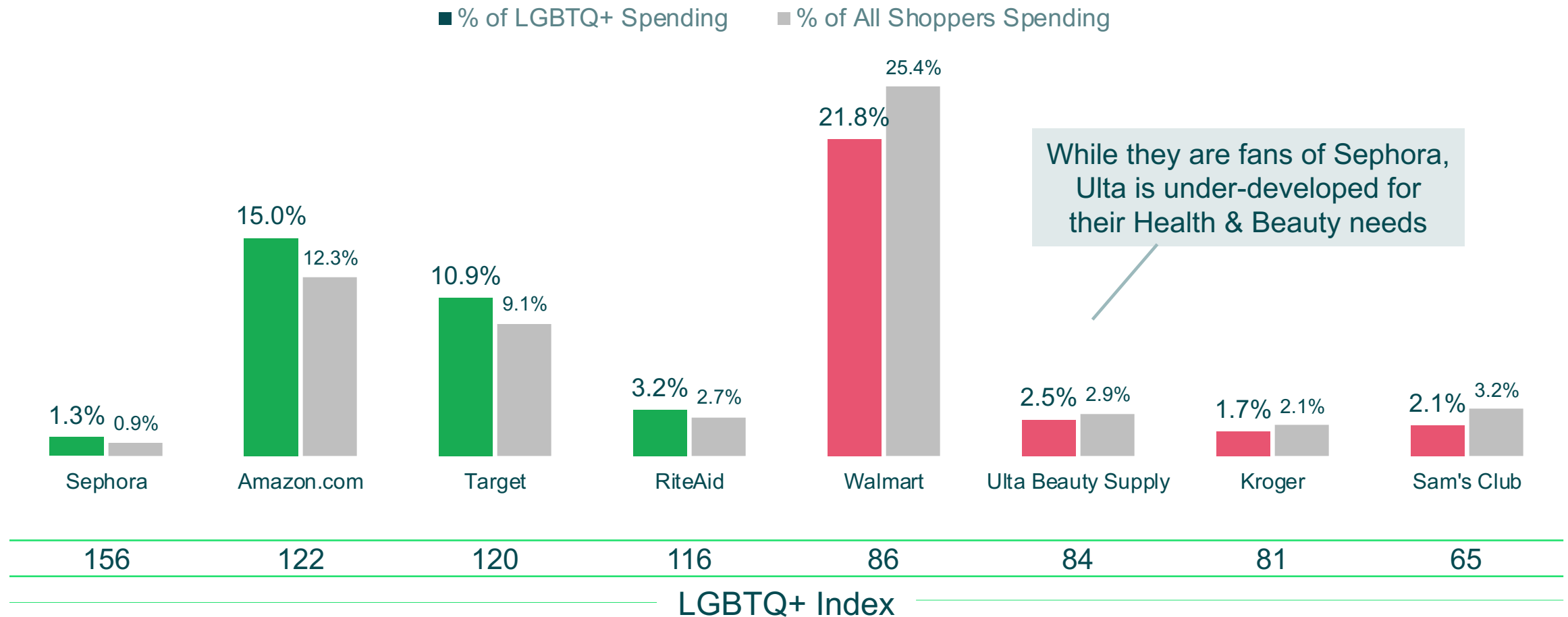
119



117

LGBTQ+ consumers turn to Sephora, Amazon, and Target for their Health & Beauty products

Top Banners (Health/Beauty sector), LGBTQ+ vs GenPop



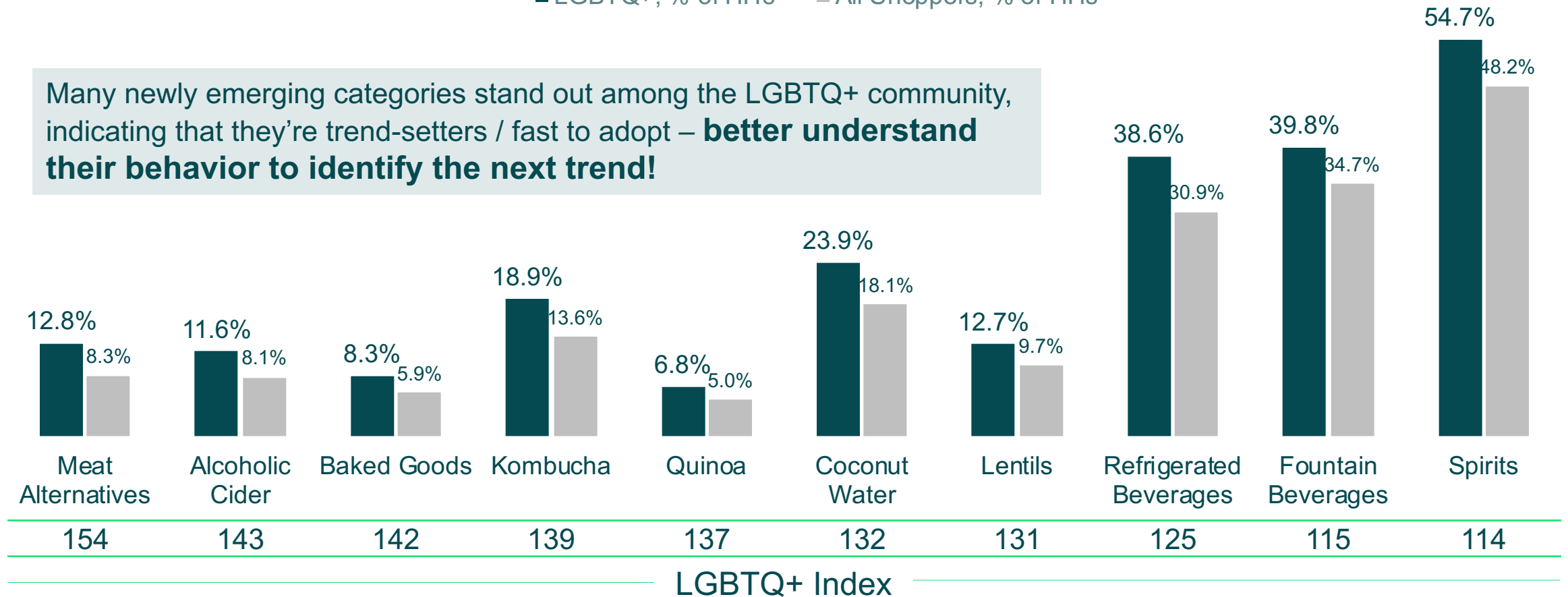
LGBTQ+ consumers stay on top of food trends,
prefer cool/stylish brands, & gravitate towards
some interesting categories

LGBTQ+ consumers seem to be trend-setters, more likely to buy categories that were niche but now mainstream

HH Affinities (Grocery sector), LGBTQ+ vs GenPop

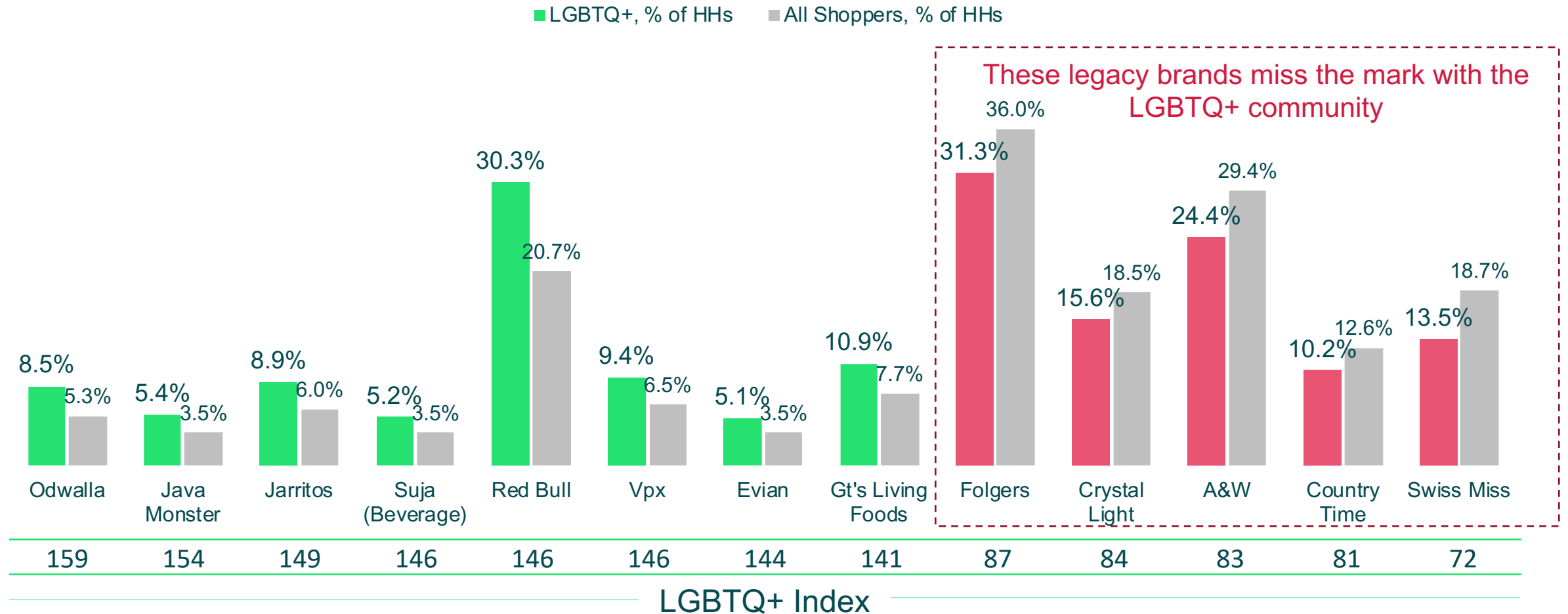
■ LGBTQ+, % of HHs ■ All Shoppers, % of HHs

Many newly emerging categories stand out among the LGBTQ+ community, indicating that they're trend-setters / fast to adopt – **better understand their behavior to identify the next trend!**



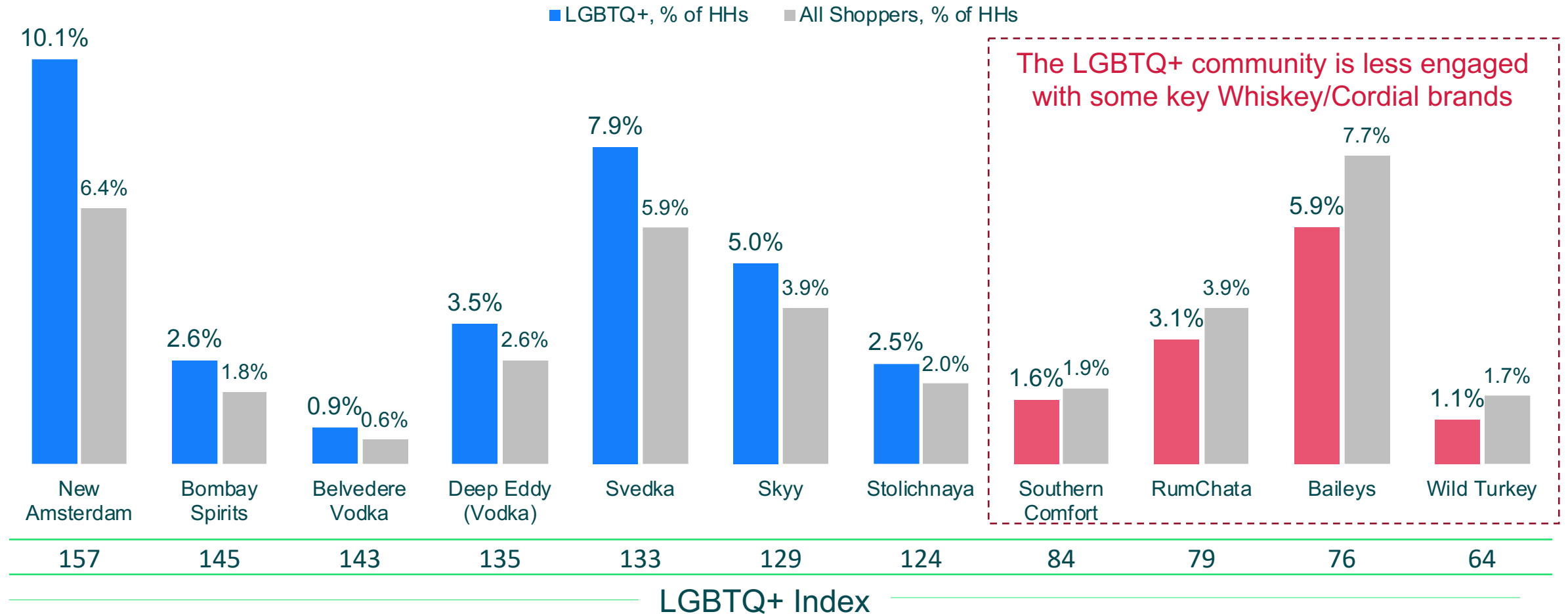
They're also are likely to purchase more stylish, mostly smaller beverage brands in emerging categories

HH Affinities (parent brands within Beverages), LGBTQ+ vs GenPop



Within Spirits, Gin & Vodka brands stand out among the community

HH Affinities (parent brands within Spirits), LGBTQ+ vs GenPop

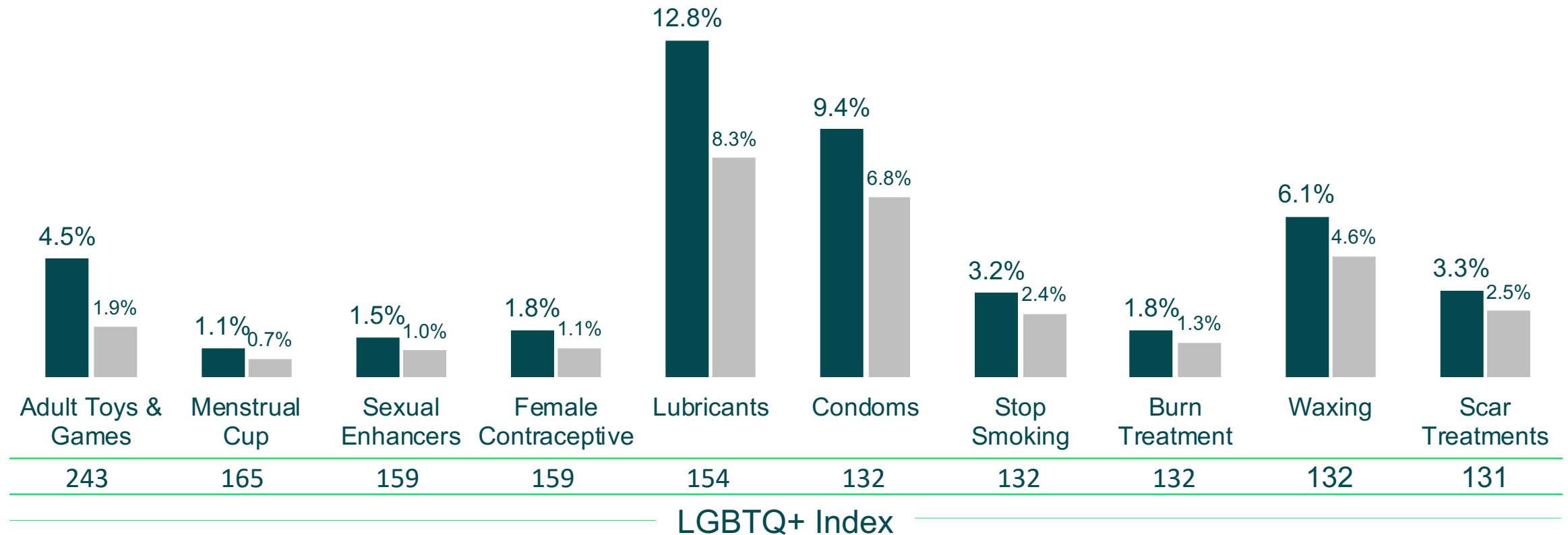


When shopping for Health/Beauty Care, LGBTQ+ consumers are much more active across many Sexual Health categories

HH Affinities (Health/Beauty sector), LGBTQ+ vs GenPop

Ranked by index

■ LGBTQ+, % of HHs ■ All Shoppers, % of HHs



The LGBTQ+ community prefers a
variety of QSR chains &
loves their Electronics/Gadgets

The LGBTQ+ community has a bit of a *thing* going for Papa John's, Panera, Raising Canes, & Taco Bell

TOP INDEXING QSRs

(% of HHs visiting)



154 Index



133 Index



132 Index



112 Index

LOWEST INDEXING QSRs

(% of HHs visiting)



44 Index



83 Index



82 Index



90 Index

And the community has a love for electronics, especially gaming, assistants, and smart home and health tech



26%

Purchased a video game

Index to Total US Shoppers: 113



\$120

Spent on Smart Speakers and Assistants

(like Echo, Google Home)

Index to Total US Shoppers: 130



39%

More inclined to buy
Smart Energy & Lighting

\$85 spent per year on average



\$457

Spent on average on Smart watches

(like Apple Watch, Galaxy Watch)

Index to Total US Shoppers: 125

What we're seeing

The LGBTQ+ community is an emerging force in the economy and marketers have started to pay attention

These consumers, while similar in some regards, stand out for their natural/organic commitment, trendiness, & tech savviness

Retailers and brands that win with this group tend to be more fashionable & on-trend, while legacy retailers/brands are struggling to engage with them

Why it matters to you

Winning with this group depends on several factors – but brand equity/perception and corporate/company values are key.

Brands & retailers have an opportunity to understand how to build out their LGBTQ+ strategy before it's too late.

The marketing landscape for LGBTQ+ consumers is rapidly evolving, with more & more actively targeting the community – but there is opportunity to impact it.

How you can take action

Contact your Numerator consultant to find out things like:

How can I find out how my brand is currently doing with the LGBTQ+ community?

Are there innovation opportunities to better engage this group?

Is my messaging relevant, effective, & trustworthy?

How can I better understand this audience and reach/engage with them first?



Numerator

NEW FRONTIERS

Engaging the **LGBTQ+** community

Reach out to your consultant or hello@numerator.com to learn how Numerator can help you better understand the LGBTQ+ community.