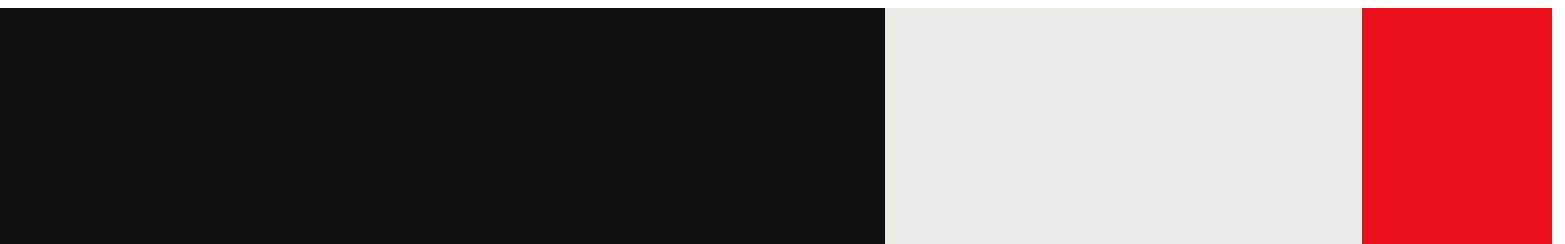


# The Daily: Reaching LGBTQ+ folks, TikTok vs. Instagram for Gen Z, and which X users are leaving the fastest?

Audio



On today's podcast episode, we discuss who the LGBTQ+ community are, their relationship with advertisers, and what advertisers are getting wrong. "In Other News," we talk about the battle between TikTok and Instagram for young people's attention and which X (formerly Twitter) users are leaving the platform the fastest. Tune in to the discussion with our analyst Paola Flores-Marquez.

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## Episode Transcript:

Marcus Johnson:

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Paola Flores-Marquez:

And so a large number of them have boycotted businesses for not being supportive or for backing down. When companies back down from supporting these issues, at best, they're not going to gain any support, and at worst, they're going to lose a lot of that support, especially pivotal generations like Gen Z.

Marcus Johnson:

Hey, gang. It's Thursday, October 5th. Paola and listeners, welcome to Behind the Numbers Daily, an eMarketer podcast made possible by Intuit Mailchimp. I'm Marcus. Today, I'm joined by our demographics analyst based in New York, it's Paola Flores-Marquez.

Paola Flores-Marquez:

Hello, thank you for having me. So happy to be here.

Marcus Johnson:

Hello, there. Hello, hello. Thanks for hanging out today. No Today's Fact, because instead, it's time for our Surprise Question Giveaway. Every other Thursday, I read a trivia question. All you have to do is email or Instagram message us the correct answer to that question, and also send us a review of this podcast, and you could win a free Behind the Numbers branded water bottle. What? I know, we spoil you. So, a correct answer plus a screenshot of your review of this podcast equals free water bottle. The last question we asked a few weeks ago was, what is the oldest university in the world? Paola, do you know what that is?

Paola Flores-Marquez:

I think I do.

Marcus Johnson:

The oldest university. Oh.

Paola Flores-Marquez:

Yeah.

Marcus Johnson:

You don't win anything, just because I just want to-

Paola Flores-Marquez:

Can I say it? I can't say it.

Marcus Johnson:

You can say it because we already have a winner.

Paola Flores-Marquez:

Oh, okay.

Marcus Johnson:

I'm just letting you know you don't win anything, [inaudible 00:02:18].

Paola Flores-Marquez:

Is it Oxford?

Marcus Johnson:

Oh.

Paola Flores-Marquez:

Is it Cambridge?

Marcus Johnson:

Close second. Oxford is a close second. Cambridge, I'm not sure. Oxford is a close second by not many years at all. The first, the oldest is the University of Bologna in Northern Italy.

Paola Flores-Marquez:

Oh.

Marcus Johnson:

Yeah, founded in 1088. I think Oxford was like 11 something. It was very, very shortly after. So, good guess.

Paola Flores-Marquez:

Thank you, yeah. Okay, now I know for my next trivia game. Now I know.

Marcus Johnson:

Exactly. You're welcome. The University of Bologna, Northern Italy, founded in 1088, having never been out of operation, holds the title as the oldest university in the world. Until relatively modern times, the university only taught doctorate studies, but today teaches a lot of other things to around 90,000 students. Famous alumni include three popes. And Abby in Nebraska, you won. So, Stuart, who runs the team, he will be sending you your free Behind the Numbers branded water bottle. So, congratulations to you.

For folks who are like, "Yeah, but I need one of those in my life too," which is probably very few people, but if you do, we have another question for you. This question for this week is, what did the Hollywood sign use to read when it was initially put up? Paola, any guesses on this one?

Paola Flores-Marquez:

Okay, this one I definitely know. It's (beep).

Marcus Johnson:

Oh, you do?

Paola Flores-Marquez:

Yeah.

Marcus Johnson:

Oh, no! You've got to keep it to yourself. We're going to have to cut that.

Paola Flores-Marquez:

No! Oh, cut that out!

Marcus Johnson:

We're going to have to cut it. We'll bleep out when you said the actual answer.

Paola Flores-Marquez:

Okay. No, this one I definitely know because I grew up in LA, so I got this one.

Marcus Johnson:

Oh. Is it common knowledge for LA people?

Paola Flores-Marquez:

I think so, yeah. Most people are obsessed with movies.

Marcus Johnson:

I had no idea.

Paola Flores-Marquez:

Yeah.

Marcus Johnson:

Interesting. All right, well, luckily we bleeped it out because Paola was right. If you also know, then you can send your answers plus a review of this podcast to [podcast@emarketer.com](mailto:podcast@emarketer.com). Or you can Instagram message us. I don't know how to say it, @insiderintelligence. One word. Okay, enough of that. Today's real topic, reaching the LGBTQ+ community.

In today's episode, first, in the lead, we'll cover how to reach the LGBTQ+ community. Then for in other news, we'll discuss whether more young people use TikTok or Instagram and which folks are most likely to leave X, formerly Twitter. We start, of course, with the lead, and we're talking about the LGBTQ+ community. We're going to talk about who they are, their relationship with advertisers, what advertisers are getting wrong, getting right, and then their representation in media and ads. So, a lot to cover, Paola. We'll start with who are they? Who are the LGBTQ+ community?

Paola Flores-Marquez:

Right. So, LGBTQ+ stands for lesbian, gay, bisexual, trans, queer or questioning, and then the plus includes intersex, asexual, and a number of other identities. It's really a loosely defined group of individuals that are united by cultural and political similarities. And for a really long time, the general knowledge of it saw it as rooted in sexuality, but our modern definition of it is a lot more complex. We're talking about navigating the relationship between sexuality, identity, and an existence outside of a traditionally mainstream culture that can often make people very vulnerable. And so they're very, very politically aware.

Marcus Johnson:

Yeah, and there's a lot of folks in this community. 7% of US adults describe themselves as lesbian, gay, or bisexual according to a 2022 Pew survey. The number swells to 17% when you ask the young folks, 18 to 29, and not only that, Gallup research found that these shares have doubled in the past decade and close to 2% of American adults are transgender or non-binary, according to Pew, 5% of young people identify as transgender or non-binary. And also, a quarter of all US adults say they have a friend who is transgender as well. So, it's a large community and a lot of folks are part of this community. They know folks who are in this community, friends, family. You also note, Paola, that it's a community of people with titles that you might not associate or that maybe the stereotypes don't associate with this community. You might think of younger folks when you think about this community, but they're also parents, grandparents, business owners.

Paola Flores-Marquez:

Yeah, that's correct. Yeah, yeah, yeah. I mean, 22% of the LGBTQ+ population has kids, and of those parents, 30% are transgender or non-binary. So, I think that's an aspect we don't often see or think about. And yeah, there are tons of grandparents that we don't think about. 18% of LGBTQ+ members are grandparents because many of them were married before coming out, and they had a very late in life sort of [inaudible 00:07:04] of their identity.

Marcus Johnson:

Yeah, those numbers I dished out were for US adults, 7% describing themselves as lesbian, gay, or bisexual. But there was a recent worldwide Ipsos study that found similar shares, 9% of adults, and they found 10% of Americans, 9% of adults worldwide, 10% of Americans identifying as part of the LGBTQ+ community. So, that's who they are. Paola, you've also



done a bit of digging recently into the short history of advertising to this community. What'd you uncover?

Paola Flores-Marquez:

Yes. Oh, it was so much fun to look into this. First of all, it's important to note that the LGBTQ+ community goes back a lot longer than advertising to them has ever happened.

Marcus Johnson:

Yeah.

Paola Flores-Marquez:

But a good place to start is with the Stonewall riots, as much of the US history around LGBTQ+ movement starts, and initially it was alcohol companies that started first putting ads into a lot of publications around the country. And part of that is because the idea of a gay stereotype was so tied to nightlife, but a lot of those alcohol companies have managed to maintain that relationship. Absolut is one of the main ones. They recently had a campaign that was like, "30 years of coming out and coming in," which is very cute. But yes, that was the initial wave of it.

Marcus Johnson:

Okay.

Paola Flores-Marquez:

And then in the '90s, as the community started gaining more rights and more visibility, there started to be a lot more very subtle advertising towards them. It was nothing very explicit until the 2000s. And then in the 2000s, as they started getting even more rights and the movement sort of picked up steam in popular culture, advertising became much more direct, and one thing to note is that advertising, the way in which we advertise to these communities is often indicative of the level of how the community is being treated in a larger sense. And so it's important to note that especially now as a lot of these communities are under attack again, the sort of retreat from being able to support them publicly.

Marcus Johnson:

And you mentioned under attack again, how many, what's the number of bills that are trying to or would if passed revoke rights from this community? Is it close to 500?

Paola Flores-Marquez:

The Human Rights Campaign reports that there are more than 800 anti-LGBTQ+ bills nationwide.

Marcus Johnson:

Oh, wow. Yeah. Gosh, hard to wrap your head around. So, I mean, there's been a history, somewhat of a history of advertising to this community. What are the modern attitudes of the LGBTQ+ community and their relationship with advertisers today?

Paola Flores-Marquez:

There's always been a semi-contentious relationship going all the way back to the initial pride marches. There's always been a contingent of the community that's been against any sort of consumerism within this political action. But there's also a subset of people who at those initial pride marches when corporations started supporting them, they were a symbol that they were welcome, that their business was welcome in those spaces, and then they were a symbol that they were being accepted into a larger community. And so that's also a pretty pervasive attitude, especially as we live our day-to-day lives and a lot of those barriers and those judgments start to get broken down more and more.

But I think still we're talking about a very politically aware community, if not politically active, and many of them state that, 79% say that they notice when a brand is being performative. Things like only celebrating in June or only making a statement through a spokesperson and never really putting their money behind where their words are. And so I think the relationship today is a little bit wary but curious and supportive, and especially among younger generations that are a lot less opposed to advertising as a whole in every aspect of their entertainment and daily lives.

Marcus Johnson:

Yeah. You mentioned the political activism element of this, and you had a stat that you shared with me. The activities perceived to show the strongest support for the LGBTQ community, taking a political stance to support LGBTQ+ equality, 85% of folks saying that, then taking a political stand, a stance to support transgender rights, 82%, and actively supporting this

community, LGBTQ+ employees, 82%. So, there's some of the ways folks are expecting companies to show their support. This is from CMI. They're also really high shares, which I thought was quite interesting.

And then you mentioned not just advertising to this community in June. This to me, when I was thinking about what advertisers are getting wrong, this tops the list. Don't just pay attention to this community in June during their, quote, unquote, "designated month." Women's history shouldn't only matter in March. Black history isn't just relevant come February. And I'm astonished, and I'm curious your take as to why advertisers feel like they only need to concentrate on these different communities, but in particular LGBTQ+ folks in June. Why do they keep getting this wrong?

Paola Flores-Marquez:

I think it's an easy win, right? To do it when everyone else is celebrating. It kind of lets you schedule ahead, it lets you plan. But I do think that you raised the point that it isolates them and emphasizes those divisions and seeing them as a separate part of the population, when our goal should be to just have it be run of the mill, right? To not have that distinction, to not have that sort of separation. And I think part of that is probably, I mean, some of them already do have regular representation in commercials, but I think part of that is kind of being more vocal and committed to engaging with these issues, not just from an advertising perspective, but also from what they invest in nonprofit-wise or cause-wise and making that really visible.

And that really pays off, because we can't have this conversation without talking about Gen Z, which is again, the queerest generation that we have at the moment, and even those that aren't queer themselves, they're allies. And so a large number of them have boycotted businesses for not being supportive or for backing down. When companies back down from supporting these issues, at best, they're not going to gain any support, and at worst, they're going to lose a lot of that support, especially pivotal generations like Gen Z.

Marcus Johnson:

Yeah, you're not just appealing to this community, you're spot on. Let's talk about how that equates to the dollars and cents for a second, because some businesses, some companies might be thinking, "Well, how much is it really going to hit my bottom line?" Three quarters, 73% of LGBTQ+ respondents said they were more likely to buy from a company that outreaches and advertises to their community, according to CMI. But if you zoom out, same

goes for the overall population. Consumers are twice as likely to buy brands that support LGBTQ+ rights according to Edelman. Why? Because a clear majority of Americans, 70%, who don't identify as LGBTQ, who don't believe companies should publicly support the community. This is according to new research from gay rights organization, GLAD.

So, it makes sense financially. And Jeremy Goldman who writes for our briefing, he also made the point, he said, "Inclusive marketing practices are not just ethically appropriate, but also commercially sensible." Because you mentioned the boycott, two thirds of folks saying they've boycotted a brand due to their actions against the community, according to The Harris Poll survey from June, as you mentioned, the potential for boycotts as well. So, this isn't just to look good. Your business will benefit in terms of dollars made as well.

One other thing you mentioned I thought was really interesting is allies and then also the elongated or continually invested efforts from some companies and how they can pay off, because it's not just members of this community who you need to appeal to. Jason Notte of Adweek was noting Oreo's PFLAG partnership for National Coming Out Day included a spot showing a young woman bringing home her girlfriend for the first time with a #proudparent social media campaign and a website where parents could get more information and support.

I thought that was really nice, that we're not just thinking about this community in particular, but the people around them who may be struggling to understand this community, one of those groups being parents of people in this community. So, offering information and support to those parents. And then more importantly, he goes on to say, "Oreo maintained its partnership with PFLAG and stuck to its message in the years that followed." So, to your point, don't just do it once. Don't just do it at this set time. Have a continued thread throughout your actions.

Paola Flores-Marquez:

Yeah, I mean, a good reputation goes a long way, and this is a community that is very vocal. They're constantly plugged in. We always talk about how Gen Z is the first digital natives. But yeah, I think they know and they hear through word of mouth who is a good safe space, who's supportive, and who they should stay away from, and they will act on it.

Marcus Johnson:

Yes. Also, it's a pretty low bar in terms of doing the right thing. There was some research from Nielsen from this year asking what were the best ways to improve inclusivity in programming

and ads, and number one was avoid stereotyping individuals. That's a good start. 50% of people saying that. Two, be more authentic and realistic in your depictions of LGBTQ+ individuals. 46% of folks saying that. And then joint third was using more folks from this community in ads and programs and ensuring LGBTQ+ inclusivity was ingrained in all areas of the business, of the company, not just in the advertising and the programming, the outwardly-facing portions.

Paola, we're talking about the relationship between advertisers and the LGBTQ+ community. We're talking a lot about what they're getting wrong. Anything else they're getting wrong, Paola?

Paola Flores-Marquez:

I think it's very important to sort of break out of the mainstream perception of only viewing LGBTQ+ people through their romantic relationships. I think it's really great that we're seeing a lot of same sex or queer couples and family units on screen, and that's really lovely. But I think part of that breaking down a lot of the stereotypes is thinking about them outside of those relationships. So, thinking about them as business owners, thinking about them as leaders in their workforce, thinking about them as grandparents, or digital creators, right? Seeing these other aspects of them as human beings outside of what people already sort of whittle them down to when they think about LGBTQ+ people, which is their sexuality.

Marcus Johnson:

Yes. Yeah, and they don't feel like they're being represented the right way. There was a large group survey showing just 38% of LGBTQ+ folks said they were satisfied with how they're portrayed in ads. That's compared to 55% of folks who don't identify as LGBTQ+. So, they don't really feel like advertisers are getting it right. It's also interesting to note as well that a lot of folks are comfortable with gay and lesbian representation in ads. There might be a stereotype that, oh, well, people aren't going to feel comfortable with how much this community might be represented. Not true. Nearly four in five folks are comfortable with gay and lesbian representation in ads. Only one in five are not. That's according to a new report from the Cultural Inclusion Accelerator and the ANA's Alliance for Inclusive and Multicultural Marketing. Almost as many folks said the same about transgender representation as well.

And people are expecting to not only see ads, but to see contents related to folks who are outside their own identity group. Nielsen found in their 2022 Attitudes on Representation on

TV study, in the US, nearly nine in 10 Americans were interested in watching shows featuring people from outside their own identity group. I thought this number was fascinating, you mentioned the younger folks who are a greater representation of this community than when we've seen in any generation, LGBTQ+ audiences have nearly seven times the amount of representative programming to choose from on streaming platforms compared to linear TV. I thought it was a fascinating statistic in terms of content, not just ads, but overall content that's out there with folks being represented from this group. All right, that's all we've got time for the lead. Time for the Halftime Report. So, Paola, what to you was most worth repeating from the first half of the show today?

Paola Flores-Marquez:

79%, according to Harris Poll, 79% of the community states that they know when a brand is being performative. So, it's very important to be intentional when advertisers do this and to be aware of those pitfalls, and to really consider taking stronger stances or more long-term stances and advocating for the community if they want their reputation to be a positive one.

Marcus Johnson:

Yeah, that's a great takeaway. I had two real quick which we didn't get a chance to get to, but I thought were really interesting. According to the ANA, one of the main challenges marketers identify in attempting to be more LGBTQ+ inclusive, a fear of getting it wrong. And if you don't have members of this community working for your company, then ask folks outside of the company. But I think it's more you should be more concerned about fear of not getting involved at all.

Paola Flores-Marquez:

Yes.

Marcus Johnson:

Because for every consumer supporting brands that back down from LGBTQ+ ads, there are two folks who would withdraw their support from brands who acquiesce to anti-LGBTQ+ attacks, according to the ANA. So, it's better to get involved than to sit on the sidelines and wonder. And then secondly, this is just a shocking statistic, but an important one. According to data collected from the American Civil Liberties Union, being out at work, how many folks are out at work? Only three in 10 respondents are out to their entire workforce. Why? Most folks

say they have a fear of discrimination, 43%, then a fear of harassment, and then they're worried about career advancement as well. Emily Liederman of Adweek also noting similar concerns in terms of impeding half of folks from this community. Half of LGBTQ+ employees believe being out at work will impede their professional progress or cost them their job, according to a Glassdoor study.

And so this goes back to representation in ads, it's going to be more likely that folks are represented in ads if people at those companies are part of that same community, and if people do work at those companies who are part of that community but aren't out at work, then it's going to be much harder for that to translate into the ads that we see. Three quarters of workers saying their organization doesn't offer an LGBTQ+ employee resource group, an ERG. That's from a 2023 survey from Monster.com. All right, that's all we've got time for the first half. Time for the second. Today, in other news, we talk about some Gen Z media preferences and which Twitter users are leaving the platform the fastest.

Story one. Paola, in your recent report on Gen Z's media preferences, you note that Instagram will surpass TikTok in penetration in 2024. Instagram surpassing TikTok in penetration in 2024 for this young cohort of Gen Z folks, according to our forecasts. The history of this trend, within 2018, TikTok's Gen Z users were 40% the size of Instagram's, just 40% the size of Instagram's. Three years later, 2021, Gen Z user totals were neck and neck Instagram and TikTok, and they stayed that way for the next two years. But next year Instagram will pull out in front again, with 50 million Gen Z users to TikTok's 49 million Gen Z users. Paola, what do you make of this trend?

Paola Flores-Marquez:

To me, it seems like Instagram is starting to take the place that Facebook once occupied for millennials as a way of keeping in touch with a lot of family and friends and making sure that life updates get shared. Whereas even though there'll be more users, Gen Z users on Instagram, they'll still be spending most of their time on TikTok for those that are on TikTok. And so when it comes to targeted sort of information, it's going to be on TikTok and they're going to stay on there and it's their form of entertainment, and it's one of the only platforms in which they dominate completely. It is their platform in the same way that Instagram was millennials' platform.

Marcus Johnson:

Right, yes. The time spent is interesting, differing from how many folks are there. Instagram, 1 million more users than TikTok next year, as I mentioned, but that gap will widen to 6 million more in the next few years. So, continuing to increase that gap in favor of Instagram. If you want the full report, this was an excerpt from Paola's report, but the full report is called Gen Z Technology and Media Preferences: Streaming, Social Media, and Gaming Are More Than Just Daily Habits. You can click the link in the show notes or head to Insider Intelligence to find that story too.

Elon Musk recently admitted that US ad revenue was down 60%. It's not ideal, especially since we expect X, formerly Twitter, to lose users as well. We estimate that the company will lose 5% of its US users this year, 5% this year, and another 8% next year, 2024, where it will fall to 52 million. That's in the US. But Paola, you have noticed an interesting trend related to which Twitter users are leaving the platform the fastest.

Paola Flores-Marquez:

Yes. Again, Gen Z will be the last people standing on that platform, on the platform formerly known as Twitter. They seem to excel in the type of humor that Twitter has been known from. And I think that when we think about news cycles, we should also think about meme cycles, and the birthplace of a lot of these memes is Twitter. If you scroll through your Instagram or your Facebook, you'll eventually see a Twitter joke on your screen, but they're delayed by weeks or months. And so Twitter offers not only the space to create a lot of these things, but be at the forefront of a lot of this humor and sort of gather these internet points, and eventually that will transition into something else, as is the way of the internet. But for now, Gen Z has really held onto the way in which they've cultivated a very irreverent and absurd community of comedians on Twitter, or X.

Marcus Johnson:

So, the younger folks are least likely to leave the platform or are leaving at a slower pace. Put another way, next year, X, Twitter will lose about 10% of its users from every generation except Gen Z. For millennials, Gen X, and boomers, they'll lose about 10% of each of those groups where it'll just lose 2% of Gen Z folks in the US. That's all we've got time for for this episode. Paola, thank you so much for hanging out with us today.

Paola Flores-Marquez:

Thank you for having me. This was so much fun.



Marcus Johnson:

Our absolute pleasure. We'll have you back as soon as humanly possible. Thank you to Victoria, who edits the show, James, who copyedits it, and Stuart, who runs the team. And thanks to everyone for listening in. We'll see you tomorrow hopefully for the Behind the Numbers Weekly Listen, that's an eMarketer podcast made possible by Intuit Mailchimp.