COLLAGE

Align with LGBTQ+ Consumers' Evolving Values to Drive Relevance and Trust

LGBTQ+ Consumer Focus



Summer 2025

The Big Picture

Brands that foster safety and community build deeper resonance and trust with the LGBTQ+ community



Key Cultural Shift: The Bold Becoming

LGBTQ+ people are defiantly embracing their identities with newfound confidence: channeling courage and joy into collective action amid renewed threats to the community's rights and safety.

Queer spaces are becoming powerfully personal

With younger generations leading the charge, LGBTQ+ gathering spaces are evolving into inclusive, purpose-driven environments and curated events that reflect the segment's diverse identities, interests, and values.

LGBTQ+ people, many of whom are young and socially conscious, represent a powerful growth opportunity for brands

Fast Facts about the LGBTQ+ community:

24MM American adults[1]
(9.3% of the adult population)

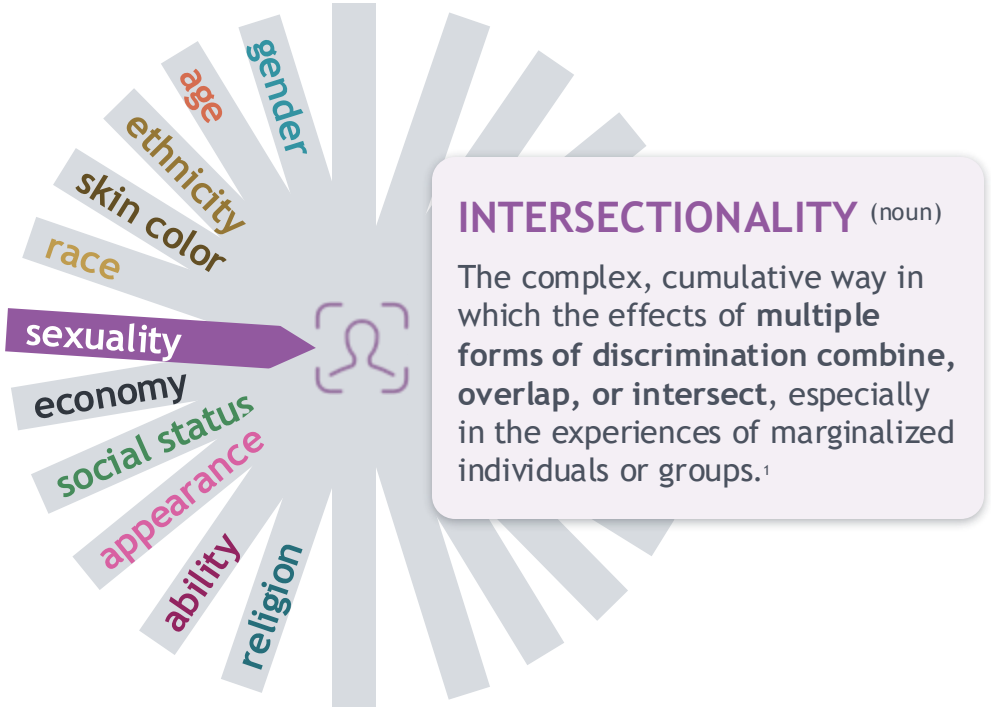
70% Gen Z and Millennials[2]

55%▲ Activists[3]
(compared to 47% of Non-LGBTQ+ people)



Sources: [1] Gallup, 2024. Q: Which of the following do you consider yourself to be? You can select as many as apply. Straight or heterosexual; Lesbian; Gay; Bisexual; Transgender. Respondents who volunteer another identity (e.g., queer; same-gender-loving; pansexual) are recorded as "Other LGBTQ+" by interviewers.
[2] Collage Cultural Traits 2025 (18-79), weighted data
[3] Collage Cultural Traits 2025 (18-79), weighted data. Original question: "I'm always looking for opportunities to support socialcauses I care about." % agree, strongly agree.
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

Their life experiences are shaped by rich, intersectional identities that brands must learn to appreciate



INTERSECTIONALITY (noun)

The complex, cumulative way in which the effects of **multiple forms of discrimination combine, overlap, or intersect**, especially in the experiences of marginalized individuals or groups.[1]

"Our traditions, our families and our heritage are important to us. **Before I ever thought of myself as queer, I was Mexican**: fresh tortillas, Día de los Muertos, huaraches, rebozos and tamales are my foremost cultural icons."

—**ASIEL ADAN SANCHEZ** THEY/THEM
ACADEMIC, WRITER[2]

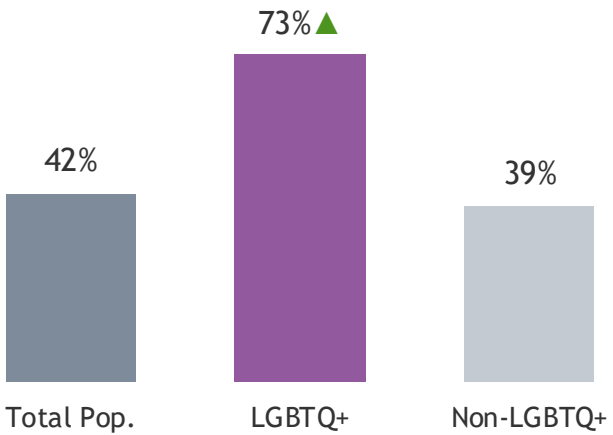


Sources: [1] Merriam-Webster, [2] Archer

Brands earn LGBTQ+ people's loyalty by supporting their community and all its intersectionality

This support also appeals to younger people, especially Gen Z

*I am more likely to consider **purchasing a brand** that **supports diversity and inclusion**.*



*% of respondents who think brands **should speak out** on the following issues [2]*

	LGBTQ+
Preventing discrimination against lesbian, gay, and bisexual people	66%▲
Preventing discrimination of transgender and non-binary people	63%▲

HALO EFFECTS

Gen Z is also eager to reward brands that support the LGBTQ+ community and diverse segments of all kinds.

Sources: [1] Collage DEI Impact Pulse Survey January-February 2025 (18-79), weighted data, % somewhat, strongly agree
[2] Collage America Now Survey, July 2024 (18-78 population) weighted data, single select grid, Top 2 box
Significance test: Confidence level 95%. ▲▼ Non-LGBTQ+ respondents

Brands that implement Inclusive Marketing 3.0 strategies will demonstrate Cultural Fluency and drive Growth with LGBTQ+ Americans

Real-Life Resonance

Capture **everyday experiences** to build **Relevance.**

Struggle Solidarity

Recognize **shared challenges** and a focus on hope to drive **Trust.**

Cultural Co-Creation

Partner with diverse consumers to boost **Values** and **Advocacy**.

v3.0

Individual Depth



Intention: Capture real-life experiences, solidarity through struggle, and cultural co-creation via individual stories.

Source: Collage 2025

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1

Key Shifts: The Bold Becoming

Keep up with trends shaping LGBTQ+ consumer behavior

2

2025 LGBTQ+ Group Traits

Build trust and engagement through Group Traits

1

Key Shifts: The Bold Becoming

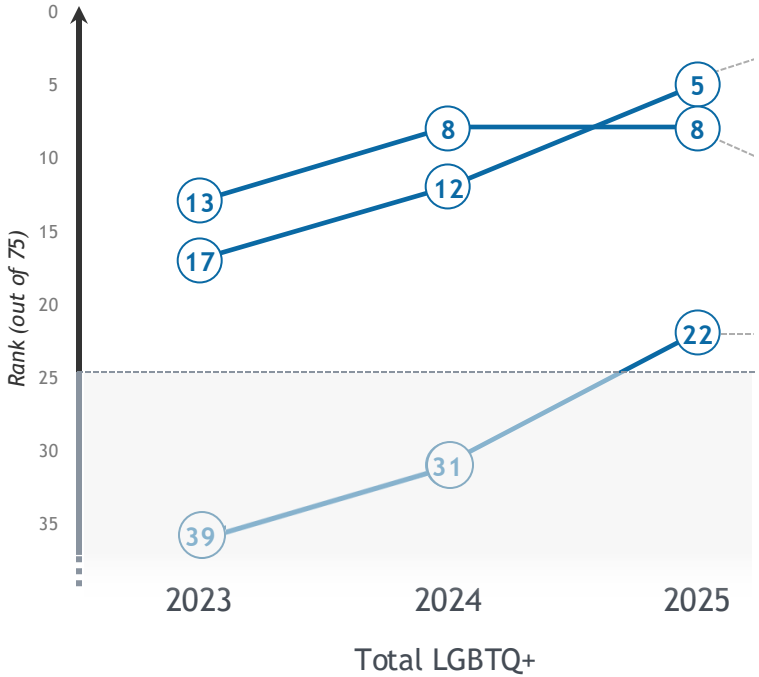
Keep up with trends shaping LGBTQ+ consumer behavior



LGBTQ+ KEY CULTURAL SHIFT

The Bold Becoming

With confidence and urgency on the rise, LGBTQ+ people are embracing the Bold Becoming by leaning fully into who they truly are.



↑↓ *Notable rank changes: 2023-2025*

↑ 12 FESTIVE
"I like to make sure other people are having fun and enjoying themselves."

↑ 5 AUTHENTIC
"I actively try to live a life that is genuine and rooted in authenticity."

↑ 17 COURAGEOUS
"I follow my goals even when I feel scared."

- **Festive** and **Authentic** steadily climb into the top-10
- **Courageous** soars among the segment, jumping 17 rank places.

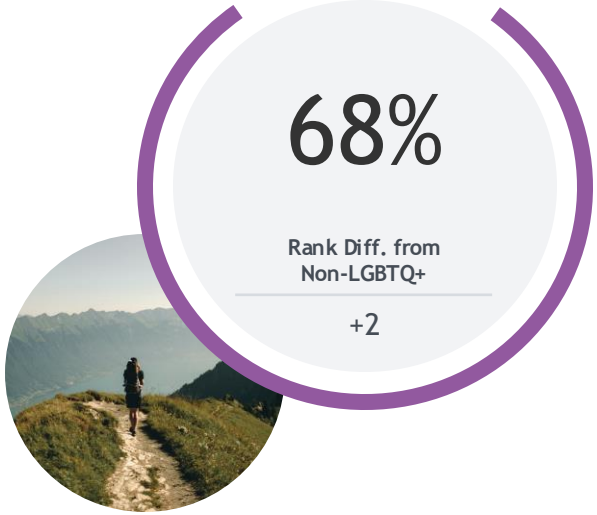
Source: Collage Cultural Traits Survey, 2023-2025 (18-79 LGBTQ+ population), weighted data, % strongly agree, agree
Ranks and differences are out of 75 total Cultural Attitudes

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The LGBTQ+ community is channeling Courage despite renewed concerns about political and cultural erasure into collective action

"I follow my goals even when I feel scared" [1]

Courageous



68%

Rank Diff. from Non-LGBTQ+

+2



Demonstrators protest outside the Stonewall Inn, after the word *'transgender'* was erased from the National Park Service's webpage. [2]

"It's been one war after another in our community that we have always won. We have always been resilient. We have always stood strong. **We have always fought for our truth, and we're still here.** They haven't been able to erase us." [2]

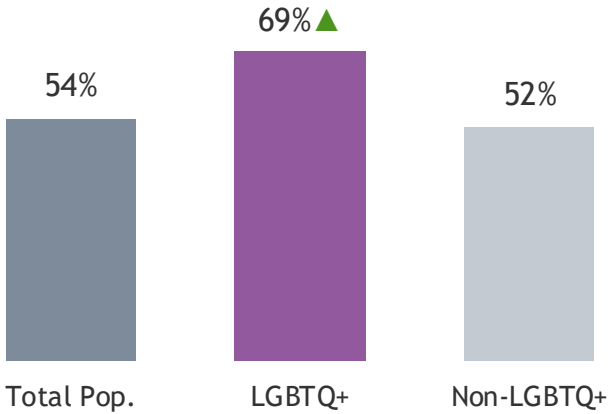
—RENATA RAMOS, TRANS RIGHTS ACTIVIST



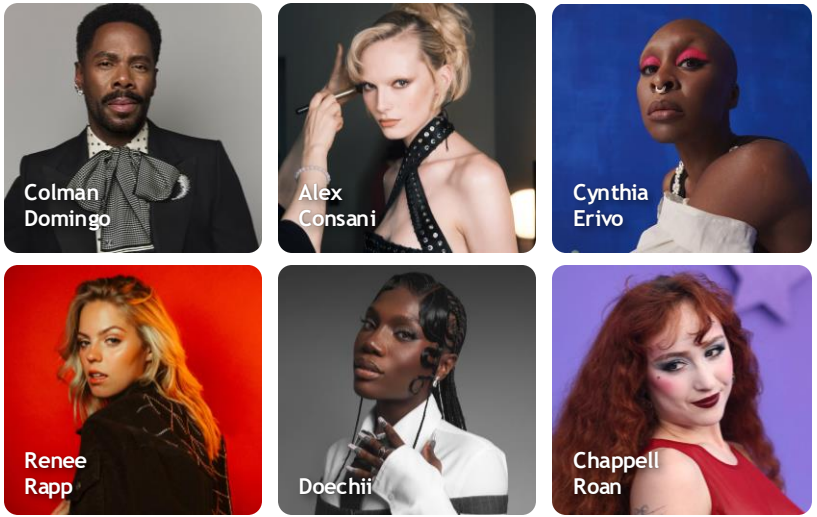
Source: [1] Collage Cultural Traits 2025 (18-79), weighted data
% agree, strongly agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%
[2] Them

As LGBTQ+ entertainers thrive in mainstream media, they're inspiring others to embrace their identities with greater Authenticity and Courage

*My **sexual orientation** has become an increasingly important part of my identity over the past few years.*



LGBTQ+ Stars Thriving in Mainstream Media



Source: Collage America Now Survey, July 2024 (18-78 population), weighted data
% agree
Significance test: Confidence level 95%. ▲▼ Non-LGBTQ+ respondents

Burned out by online hostility, LGBTQ+ people are turning to real-life spaces

Being in-person offers the emotional release and connection they can't find on their feeds

33% ↑10 of LGBTQ+ adults

51% ↑15 of LGBTQ+ teens

reported being **harassed online** within the past year, up from 23% for adults and 36% for teens in 2022. [1]

Safe spaces provide valuable **communal care** and coincide with the steady rise of the **Festive** ↑12 and welcoming mindset among the segment since 2023.





Demand for IRL connection fueled a queer space revival.

- The dramatic rebound and evolution of queer bars & restaurants. [2]
- The expansion of LGBTQ+ focused community centers in places like West Texas. [3]
- Growth of large-scale events like WorldPride, where music, dance, and shared celebration spark unity and resilience.

Sources: [1] Forbes, [2] AD, Them, [3] Texas Tribune
Collage Cultural Traits Survey, 2023-2025 (18-79 LGBTQ+ population), weighted data

Younger queer people are leading the way, turning their passions into community-building spaces

Outdoors

Arts



Moving beyond traditional queer venues like bars and nightclubs, LGBTQ+ individuals are creating inclusive, passion-driven curated events that reflect their diverse identities, interests, and causes they care about.

HALO EFFECTS

2025 GEN Z GROUP TRAIT:

COLLECTIVE INDIVIDUALITY



Open-Minded
"I enjoy learning from people who have different perspectives and life experiences than my own"
79%

Uniqueness
"I'm proud of the things that make me different from my peers"
73%

Creative
"I like to express myself through style, creativity, etc."
72%▲

Source: @dcdykeclimb & @sfqp on Instagram
Collage Cultural Traits Survey, December 2024 (13-79 population), weighted data, % strongly agree, agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

Champion queer community-building around shared interests

Vans helps LGBTQ+ youth create spaces of belonging through surf culture

Vans champions inclusive, joyful spaces and shared passions

What they did:

- ❑ Partnered with Queer Surf, a grassroots organization that hosts queer-affirming surf lessons and meetups, fostering community through the shared joy of surfing.
- ❑ Featured queer surfers and stories in branded content to amplify visibility and belonging.
- ❑ Supports the broader movement to make outdoor culture more inclusive for LGBTQ+ people.

Why it works:

This partnership aligns with younger LGBTQ+ people's values of turning passions into inclusive, affirming spaces — helping build community through shared presence and joy.

73 Vans' B-CFQ* score for LGBTQ+
vs. category average of 70



Source: @Vans on TikTok
Collage, CultureRate:Brand Studies, February 2025 (13-79 population)

2

Group Traits

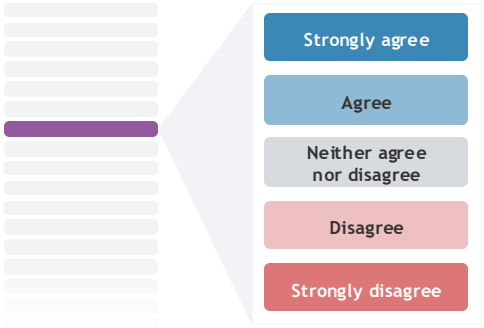
Build trust and engagement through Group Traits



Group Traits reveal consumers' nuanced motivations, over time

IN-GROUP AGREEMENT

Consumers gauge their level of agreement with 75 cultural statements



RESONANT VALUES
illuminate consumers' priorities, motivations, and aspirations

COMPARATIVE ANALYSIS

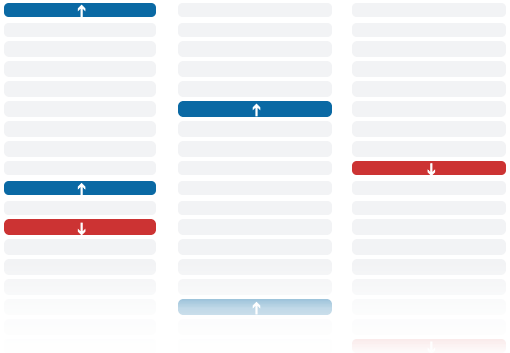
Identify uniquely resonant statements for the target segment



CORE DISTINCTIONS
examine unique, contextually important themes

TRENDING

Detect statistically significant changes in resonance over time



KEY SHIFTS
measure significant movement in agreement and rank

For more details on Group Traits methodology, refer to the Appendix

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2025 LGBTQ+ Group Traits

Group Traits shape the segment's perspective, attitudes, and behaviors across categories

PROUD



LGBTQ+ people are joyfully self-assured and love creative self-expression.

FOUND FAMILY



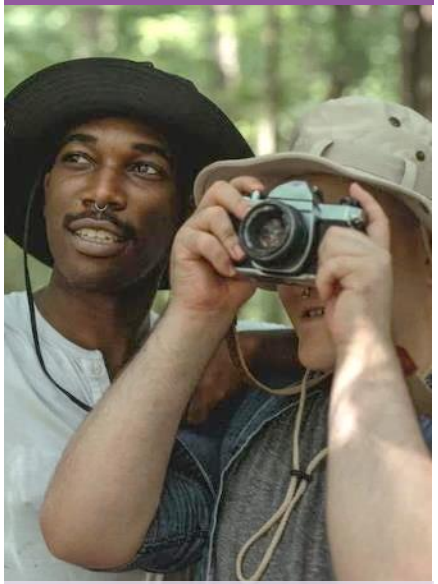
They nurture close-knit bonds and build community based on shared values.

CHAMPIONS



The LGBTQ+ segment is empathetic and driven to support and care for others.

WORLDLY



These open-minded consumers value diversity of people and experiences.

LGBTQ+ GROUP TRAITS

Proud

Celebrating My True Self

LGBTQ+ Americans are **self-assured** in their unique identities and love to **express themselves creatively**. They're a **joyful** group who take pride in their community, history, and resilience and seek more **authentic representation** in culture and the media.

Brand takeaways:

- Tell well-rounded stories about LGBTQ+ joy and identity. Celebrate their accomplishments and self-expression.
- Harness **Cultural Co-Creation** to ensure genuine portrayals of the community.



Source: Collage 2025

PROUD GROUP TRAIT

LGBTQ+ Americans are Proud of who they are

Creative

65%▲

"I like to express myself through style, creativity, etc."

Self-Assured

65%

"I will do great things in life."

Joyful

55%

"Most of my decision in life are motivated by a desire for enjoyment and fun."

RANK (out of 75)

LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+
24	+24	25	+11	46	+13

Source: Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

PROUD GROUP TRAIT

LGBTQ+ people are more likely to value being and feeling unique

The segment is more likely than others to blaze new trails in fashion and style

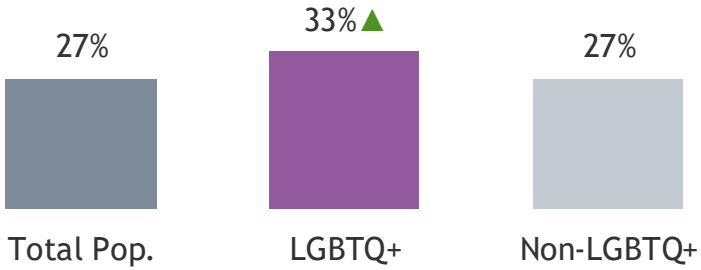
Uniqueness

70%

"I'm proud of the things that make me different from my peers"

RANK (out of 75)	
LGBTQ+	**vs. Non-LGBTQ+**
18	+1

I am a fashion trend-setter. [2]

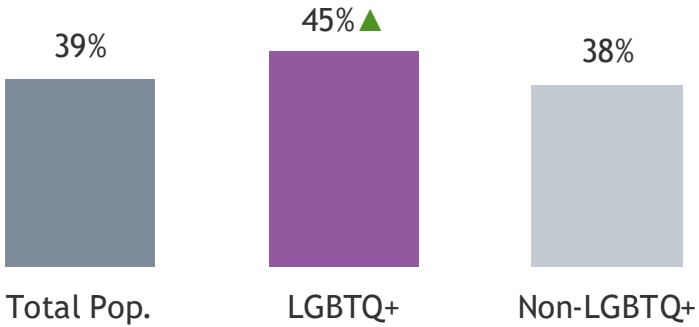


Sources: Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
[2] Collage Passion Points Survey, April 2024 (18-78 population, weighted data) % agree
Significance test: Confidence level 95%. ▲▼ Non-LGBTQ+ respondents

PROUD GROUP TRAIT

LGBTQ+ pride also means being recognized and celebrated for who you are and what you accomplish

It's important for me to receive recognition for the things I do.



"Being born gay, black and female is not a revolutionary act. **Being proud to be a gay, black female is.**"

—LENA WAITHE SHE/HER
WRITER, PRODUCER, ACTOR



Source: Essence, Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data
% agree, strongly agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

PROUD GROUP TRAIT

In 2025, Pride is grounded in joy, legacy, and activism

Joy and resilience

"Pride is the expression of radical **joy in the face of hate and erasure.**"

—LISA CONGDON
REI CO-OP PARTNER, ARTIST, AUTHOR, ADVOCATE





"All the **joy** I find in my transness stands **in defiance** of a growing din of animosity."

—LYNN C.
REI CO-OP STAFF

Visibility as protection

"Pride is not just about visibility—it's about **the safety that visibility provides.**"

—KENYA
REI CO-OP PARTNER





"**It's hard to be what you can't see…** Pride provides visibility others need."

—MIKAH MEYER
REI CO-OP PARTNER

Freedom and legacy

"Nature doesn't care whether I'm Deaf or queer… **Nature sees me as both.**"

—SAERAN "SAE" D.
REI CO-OP PARTNER





"The LGBTQ+ elders before me laid the groundwork for my growth. **I want to pay it forward.**"

—ASHLIE GRILZ
REI CO-OP MEMBER AND PARTNER

Liberation and political urgency

"Pride… must be a **rallying cry**. We must come together. Fight for each other."

—FRAN DUNAWAY
TOMBOYX FOUNDER





"Queer people have overcome tremendous injustices… Pride 2025 is about not succumbing to fear, but a **relentless devotion to hope.**"

—CAL CALAMIA.
REI CO-OP PARTNER

Source: What Pride 2025 Means to Me, by REI staff

PROUD GROUP TRAIT

LGBTQ+ consumers want to see more authentic portrayals of their community in media

55%▲

of LGBTQ+ people say brands' advertising campaigns aimed at LGBTQ+ audiences often come across as **insincere**. [1]

What would make you feel a company's LGBTQ+-focused advertising campaign is insincere? [2]

	LGBTQ+
It only happens during or around Pride Month	63%▲
It feeds into stereotypes of LGBTQ+ people	57%▲
It's not representative of the real LGBTQ+ experience	55%▲

Source: Collage America Now Survey, August 2023, 18-77 population, weighted data
% agree (other answer options included "disagree" and "not sure")
[2] Multiselect options; Respondents who agreed with the statement "When brands do advertising campaigns aimed at LGBTQ+ audiences it often comes across as insincere."
▲▼ Significantly over/under Total Pop. Confidence level 95%

Celebrate and amplify LGBTQ+ voices

NYX honors self-expression through music, uplifting queer voices

Inclusive Marketing 3.0: Cultural Co-Creation

NYX makes a *Pridemix* with rising queer artists to spotlight underrepresented voices in music.

What they did:

- ❑ Released the PrideMix playlist, featuring emerging LGBTQ+ musical artists across genres.
- ❑ Collaborated with creators to reflect how makeup and music can be bold forms of self-expression and emotional release.
- ❑ Used social platforms to shine a light on talent that's often overlooked—turning up the volume on LGBTQ+ brilliance.

Why it works:

It reflects LGBTQ+ pride as being seen, heard, and celebrated for who you are and what you create.

73 NYX's B-CFQ* score for LGBTQ+
vs. category average of 62

NYX's Pridemix features three emerging queer musicians: Zolita, Destin Conrad, and Tiana Major9



Sources: NYX on Facebook
Collage, CultureRate:Brand Studies, March 2025 (13-79 population)

LGBTQ+ GROUP TRAITS

Found Family

Community Creators

LGBTQ+ Americans carefully nurture deep ties with the people they deliberately **welcome** into their lives. They create **close-knit** bonds with friends they value as much as biological family. LGBTQ+ people **seek community** through shared interests and identity, both online and in real life.

Brand takeaways:

- Create Real-Life Resonance by facilitating community building.
- Protect and uplift existing communal spaces while also hosting branded spaces where the segment feels welcome and safe.



Source: Collage 2025

FOUND FAMILY GROUP TRAIT

LGBTQ+ individuals form Found Families—united by shared values and experiences

Hospitable

83%

"I strive to make sure others feel welcome and comfortable."

Close-Knit

78%

"I consider someone 'family' if we are really close, even if we're not related."

Community-Seeking

64% ▲

"I seek out ways to connect with people who have similar lifestyles and interests as me."

RANK (out of 75)

Hospitable		Close-Knit		Community-Seeking	
LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+
2	+4	7	+5	32	+12

Source: Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

FOUND FAMILY GROUP TRAIT

Found Family ties provide crucial support networks and sense of belonging

Friendsgiving is an important occasion to celebrate the families LGBTQ+ people choose

"I think the idea of a Friendsgiving is very queer, especially when you consider **how important chosen family is to the queer community**. Not even important — oftentimes that's all we have… It makes me think about the **strength of my bonds with my chosen family**, how much deeper that connection is because of our shared identity. **It can feel deeper than blood**."

—TONY ORTIZ THEY/THEM
CHEF



53%▲

of LGBTQ+ people celebrate **Friendsgiving.** [1]

Compared to 36% of Non-LGBTQ+ people

Source: Collage Holidays & Occasions 2025 (18-79 respondents who celebrate Thanksgiving), weighted data
% agree
Significance test: Confidence level 95%. ▲▼ over/under Non-LGBTQ+
New York Times

Educate and keep LGBTQ+ culture alive

Levi's honors the legacy of public parks as safe spaces for Found Family

Inclusive Marketing 3.0: Real-Life Resonance

Levi's celebrates the significance of public parks as joyful, affirming spaces for LGBTQ+ connection.

What they did:

- ❑ Released a Pride collection inspired by togetherness, safe spaces, and resilience —rooted in LGBTQ+ history.
- ❑ Partnered with local queer creatives to model the collection and share real stories of friendship and belonging.
- ❑ Sponsored events and donated to organizations like Outright International, The Trevor Project, and others.

Why it works:

This resonates with LGBTQ+ Americans' values honoring the legacy of queer spaces and continuing the effort to keep them alive.

81 Levi's B-CFQ* score for LGBTQ+
vs. category average of 68



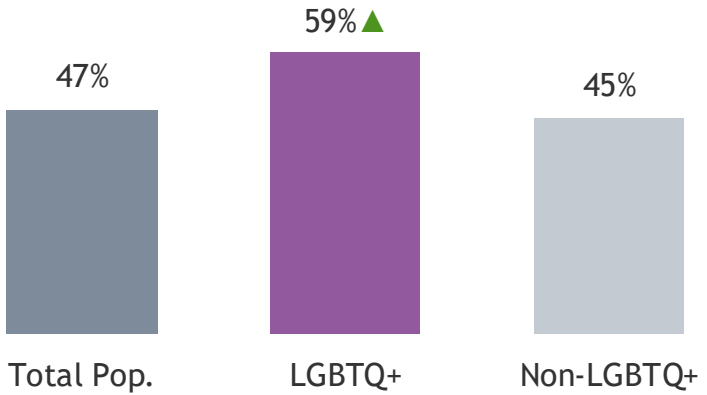
Levi's, Meet You in the Park

Sources: Levi's on YouTube
Collage, CultureRate:Brand Studies, February 2025 (13-78 population)

FOUND FAMILY GROUP TRAIT

LGBTQ+ Americans are social media super users who rely on digital platforms to nurture and create new community ties

I spend at least 3 hours a day on social media.[1]



% of LGBTQ+ social media users who frequently use social and digital platforms to: [2]

66% **Connect with friends** in the LGBTQ+ community

56% **Find new friends** in the LGBTQ+ community

Source: [1] Collage Media Survey, July 2023, 18-77 social media users, weighted data
Single select; Original question wording: "How long are you on social media, in a given day?"
Significance test: Confidence level 95%. ▲▼ Non-LGBTQ+ respondents
[2] LGBT Tech and Data for Progress Survey , 2024

FOUND FAMILY GROUP TRAIT

The gaming world is another safe place for LGBTQ+ individuals to hang out, connect, and express themselves

60% ▲

of LGBTQ+ consumers like or love **playing video games.** [1]

compared to 49% Non-LGBTQ+

Why do you play video games? [2]

	LGBTQ+
To escape my normal routine	57%
To express myself	34% ▲
To do things I can't do in real life	30% ▲
To create a new identity or story for myself, role play	30% ▲
For a sense of competition or challenge	30% ▼
To connect with other people	27%
To customize my character	22% ▲

Source: Collage Passion Points Survey, April 2024 (18-78 population), weighted data
[1] Single select, % like, love; [2] Multiselect (only respondents who play video games)
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

Empower LGBTQ+ individuals to express themselves and connect with friends through video games

Inclusive Marketing 3.0: Cultural Co-Creation

The Sims teamed up with queer creators to celebrate friendship and self-expression through live-streamed play.

What they did:

- ❑ Invited Quen Blackwell, Megan Thee Stallion, and Ebonix to create comedic content on the video game, The Sims.
- ❑ Streamed it live from Dream Con 2025, a popular gaming and anime convention among Multicultural consumers.
- ❑ Showcased how gaming can be a space for creative expression and connection appealing to LGBTQ+.

Why it works:

It taps into LGBTQ+ Found Family values: showing how gaming creates joyful space to gather and build your own world from an intersectional perspective.



The Sims, *Hotties Play Thee Sims* Livestream at Dream Con 2025

Sources: @TheSims on X, EA

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LGBTQ+ GROUP TRAITS

Champions

Advocating with Empathy

LGBTQ+ Americans **actively support** their loved ones through hard times and want to forge meaningful **relationships** with those around them. This mindset makes them more aware of the challenges other people face and motivates them to **express** their concerns about injustices through **activism**.

Brand takeaways:

- Demonstrate Struggle Solidarity by recognizing their challenges while reaffirming your commitment to making a difference.
- Launch charitable initiatives that help LGBTQ+ people give back while shopping with your brand.



Source: Collage 2025

CHAMPIONS GROUP TRAIT

LGBTQ+ Americans champion the people and causes important to them

Supportive

81%

"I make an effort to be there for others when they need me."

Expressive

63%

"I embrace opportunities to share my ideas with others"

Relational

59%

"I want to feel a personal connection with most people I meet."

RANK (out of 75)					
LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+
4	-	34	+4	36	+16

Source: Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%
Trending statements are based on (1) statistically significant changes in % agreement since 2022; confidence level 95% and (2) changes in relative rank

CHAMPIONS GROUP TRAIT

By definition, the LGBTQ+ community is diverse, with an ever-growing embrace of infinite intersections of identity



Designed in 2018, the **Progress Pride Flag** emphasizes the LGBTQ+ community's diversity, history of intersectionality, and solidarity with Black and Brown people.









Sources: Them, NQAPIA, Latinx History Project, Keshet, Center for Black Equity

CHAMPIONS GROUP TRAIT

LGBTQ+ people lean into their activist qualities

Activist [1]

55% ▲

"I'm always looking for opportunities to support social causes I care about"

RANK (out of 75)	
LGBTQ+	vs. Non-LGBTQ+
43	+19

Prominent LGBTQ+ Activists [2]



PEDRO ZAMORA
TV PERSONALITY, AIDS EDUCATOR



BARBARA GITTINGS
ACTIVIST, ORGANIZER



MARSHA P. JOHNSON
ACTIVIST, DRAG QUEEN



JACK BAKER & MICHAEL McCONNELL
MARRIAGE EQUALITY ATTORNEYS

Source: [1] Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
[2] The Trevor Project
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

CHAMPIONS GROUP TRAIT

LGBTQ+ Americans are working to tackle issues that affect their community

"We know that houselessness rates are much, much higher among trans and queer youth because of lack of family acceptance. Literally, people not being accepted by their families of origin […] and running away from home and not having anywhere to live." [1]

—JONATHAN FROCHTWAJG HE/HIM
PR & GRANT MANAGER, CASCADE AIDS PROJECT



LGBTQ+ issues and challenges

YOUTH HOMELESSNESS

28% of LGBTQ youth experience homelessness or housing instability at some point in their lives. [2]

FOOD INSECURITY

22% of LGBTQ+ adults live in poverty and are disproportionately affected by food insecurity. [3]

ELDERLY SUPPORT

70% of older LGBTQ+ people are worried about hiding their identity in a long-term care community. [4]

HEALTH DISPARITIES

LGBTQ+ adults are more than **2x** as likely to have a mental health condition as heterosexual adults. [5]

Source: [1] OPB [2] The Trevor Project, [2] Feeding America, [3] Human Rights Campaign [4] American Psychiatric Association,

CHAMPIONS GROUP TRAIT

They also want brands to Champion causes they care about

79%▲

of LGBTQ+ Americans think brands and companies should be **involved in social and political issues.** [1]

compared to 66% of Non-LGBTQ+

*% of respondents who think brands **should speak out** on the following issues* [2]

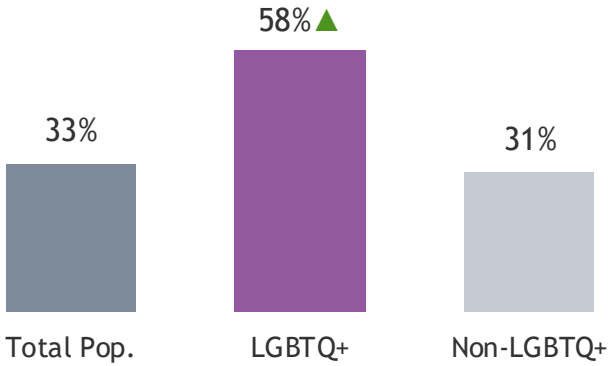
	LGBTQ+
Addressing the mental health crisis	64%▲
Addressing climate change	63%▲
Improving race relations	63%▲
Reduce the gender pay gap	63%▲
Body positivity	60%▲

Source: Collage America Now Survey, July 2024 (18-78 population) weighted data, [1] Top 2 box
[2] Top 2 box %; Original question: How do you think brands should respond to the following issues with 1 meaning brands SHOULDN'T speak up and 5 meaning they SHOULD speak up?
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

CHAMPIONS GROUP TRAIT

The LGBTQ+ segment will turn away brands that abandon them

*I have **reduced or plan to reduce my purchases** from brands that have **scaled back their DEI initiatives.** [1]*



42%▲

of LGBTQ+ consumers feel **angry** when they hear of brands stopping or reducing DEI initiatives. [2]

compared to 17% Non-LGBTQ+

Source: Collage DEI Impact Pulse Survey January-February 2025 (18-79), weighted data
[1] % Yes, [2] Multiselect option
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

Uplift LGBTQ+ business owners whose missions intersect with broader social causes

Inclusive Marketing 3.0: Struggle Solidarity

Square supports community-building around women's sports.

What they did:

- ❑ Produced a short documentary highlighting Jenny Nguyen, founder of The Sports Bra, and the vision of creating a space that celebrates women's sports and centers inclusion.
- ❑ Showcased how Square tools helped an underrepresented business grow from a local bar to the national platform.
- ❑ Amplified LGBTQ+ visibility by celebrating the cultural significance of queer-led businesses beyond Pride.

Why it works:

LGBTQ+ audiences are drawn to real intersectional stories about people and businesses driving change in their communities. It also connects with a larger fight for equity in women's sports.



square Ep. 1: Kicking off | Jenny Nguyen set out to create a space that gives women's sports the glory it truly deserves. The result? @thesportsbrapdx, a Portland bar that broke ground as the first of its kind 🏅

Sources: @Square on Instagram

LGBTQ+ GROUP TRAITS

Worldly

Cultured and Curious

LGBTQ+ people are an inherently diverse group that embraces a **cosmopolitan** worldview celebrating individuality and diverse cultures. They are **open-minded** and enjoy learning from new perspectives and **experiences**. LGBTQ+ people are eager to do, try, and see new things, especially through travel.

Brand takeaway:

- Establish Real Life Resonance with interactive, share-worthy campaigns featuring a wide variety of brand partners and influencers that helps the segment expand their horizons.



Source: Collage 2025

WORLDLY GROUP TRAIT

LGBTQ+ Americans are eager to embrace new cultures and experiences

Open-Minded

79%

"I enjoy learning from people who have different perspectives and life experiences than my own."

Cosmopolitan

65%

"I take pride in being knowledgeable about different cultures and places in the world."

Experiential

65%

"I seek out new things to do, try, see, etc."

RANK (out of 75)

LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+	LGBTQ+	vs. Non-LGBTQ+
6	+4	27	+12	28	+6

Source: Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%
Trending statements are based on (1) statistically significant changes in % agreement since 2022; confidence level 95% and (2) changes in relative rank

WORLDLY GROUP TRAIT

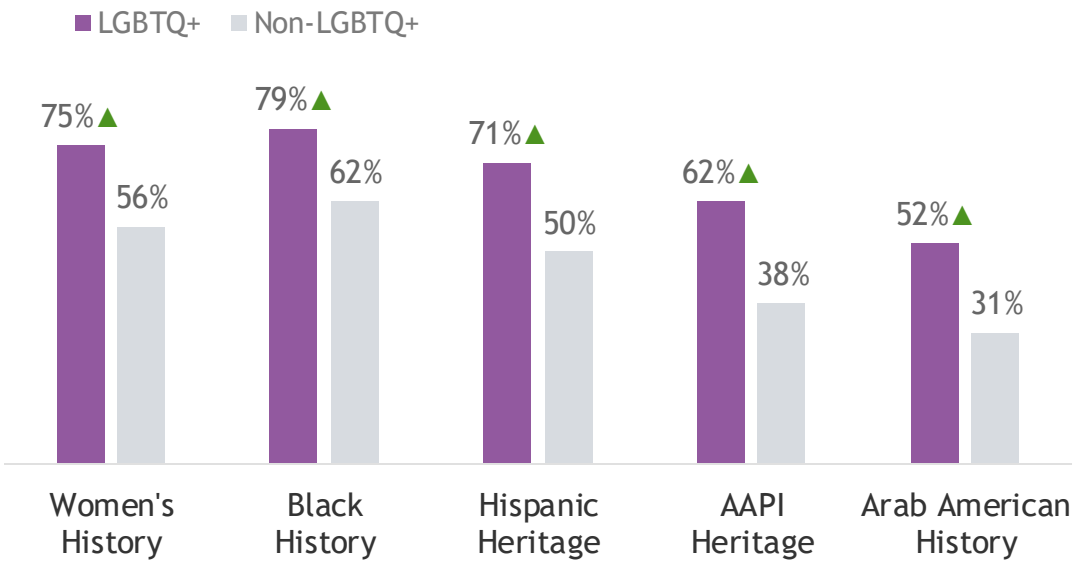
The segment likes to celebrate and learn about people of all backgrounds

80%

of LGBTQ+ people believe cultural holidays and heritage months **unite** Americans by **celebrating diversity**. [1]

HALO EFFECT: As the most diverse generation, **Gen Z** leads in celebrating cultural heritage months.

% who celebrate or acknowledge the following occasions: [2]

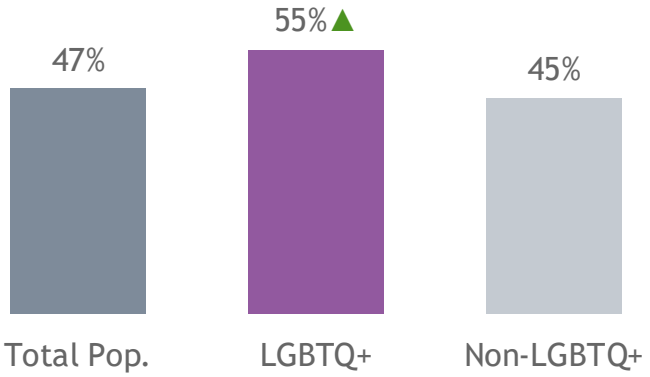


Source: Collage Holidays & Occasions 2025 (18-79), weighted data,
[1] Forced choice; Q: "Which of the two statements do you agree with more?"
[2] Single select, % celebrate or acknowledge
Significance test: Confidence level 95%. ▲▼ over/under Non-LGBTQ+

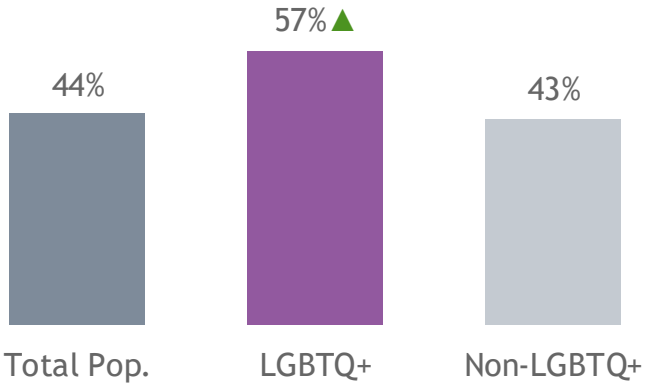
WORLDLY GROUP TRAIT

LGBTQ+ Americans want brands to engage in culture and trends with them

I like it when brands include cultural holidays in their advertising [1]



I like when brands participate in big cultural moments [2]



Sources: [1] Collage Holidays & Occasions 2025 (18-79 population), weighted data, % agree, strongly agree
[2] Collage America Now Survey, July 2024 (18-78 population), weighted data, single select
▲▼ Significantly over/under Non-LGBTQ+. Confidence level 95%

WORLDLY GROUP TRAIT

Curiosity is a *primary* cultural value for LGBTQ+ Americans

Curious

89%

of LGBTQ+ people
agree with the statement:

“If something interests me, I like to spend time learning more about it.”

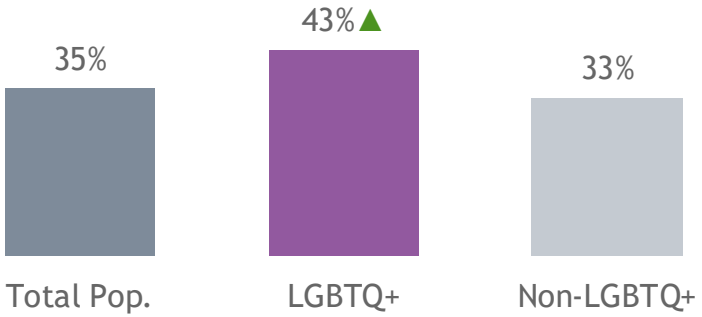


Source: Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree

WORLDLY GROUP TRAIT

LGBTQ+ people desire to see the world and have new experiences

*I would rather travel **internationally*** [1]



41%▲

of LGBTQ+ consumers say they enjoy traveling or want to travel because it **gets them out of their comfort zone.** [2]

compared to 33% Non-LGBTQ+

Source: Collage Passion Points Study, April 2024 (18-78 population), weighted data
[1] Forced choice, other option "I prefer to travel domestically in the U.S."
[2] Multiselect answer option, original question "Which of the following best describe why you like to (or want to) travel?"
Significance test: Confidence level 95%. ▲▼ Non-LGBTQ+ respondents

Celebrate LGBTQ+ joy and champion inclusive experiences

Lexus shows a non-traditional Black family going on an adventure off-grid

Inclusive Marketing 3.0: Real-Life Resonance

Lexus tells a story of a joyful family road trip, celebrating representation and exploration.

What they did:

- ❑ Highlighted a family dynamic that includes same-sex parents, underscoring their commitment to diverse representation
- ❑ Redefined outdoor adventure, blending luxury with nature—in line with the Worldly trait's embrace of new experiences.
- ❑ Created **Halo effects** with the Black consumers by affirming representation of Black men and boys as multidimensional — capable of love, joy, and carefree moments.

Why it works:

The campaign tells a story that mirrors the evolving definitions of family and adventure, resonating with the LGBTQ+ community's desire for representation and meaningful experiences.



Lexus, Pure Black Joy

Sources: iSpot

Key Takeaways & Action Steps

KNOW THIS	DO THIS
Proud: 65%▲ of LGBTQ+ Americans like to express themselves through style and creativity. They're boldly embracing their uniqueness and driving cultural trends.	• **Build Trust** by embedding LGBTQ+ voices in leadership and campaigns. Avoid performative diversity by ensuring that representation is meaningful and reflective of real LGBTQ+ experience year-round, not just during Pride. ★ **EXPLORE:** Use our **Beyond Pride** guide to learn how to earn the segment's trust through year-round engagement.
Found Family: 64%▲ of LGBTQ+ Americans seek to connect with people who have similar lifestyles and interests, both online and in real life.	• **Drive Relevance** by supporting queer spaces, community organizations, and events that create safe havens for communal care—both online and in real life.
Champions: 55%▲ of LGBTQ+ Americans are activists, they want brands to champion causes they care about and are willing to walk away from those that abandon them.	• **Align to Value** by supporting LGBTQ+ organizers and businesses and demonstrating your commitment to the causes they care about.
Worldly: 57%▲ of LGBTQ+ Americans like when brands participate in big cultural moments, they are eager to do, try, and see new things, especially through travel.	• **Generate Advocacy** by creating interactive, social media-worthy experiences help these culture-curious consumers expand their horizons.

Source: Collage 2025
Collage Cultural Traits Survey, December 2024 (18-79 population), weighted data, % strongly agree, agree
Significance test: Confidence level 95%. ▲▼ Non-LGBTQ+ respondents

Next Steps

Dive deeper into LGBTQ+ insights

Following up with Collage

- **Compare** brands and **examine** insights using the Head-to-Head Dashboard on fluenci
- Explore the publication **Beyond Pride** for year-round marketing strategies to build trust with the segment
- Register for **New Gen Z Trends: Best Practices to Unlock Market Share Across Industries** to learn more about the generation most likely to identify as LGBTQ+
- Conduct a **Qual +Why Study** to double click into insights and answer burning questions without the investment of a fully custom research study

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