

OVERDOG

Allianz  Arena

Sport and the LGBT+ community.

June 2021

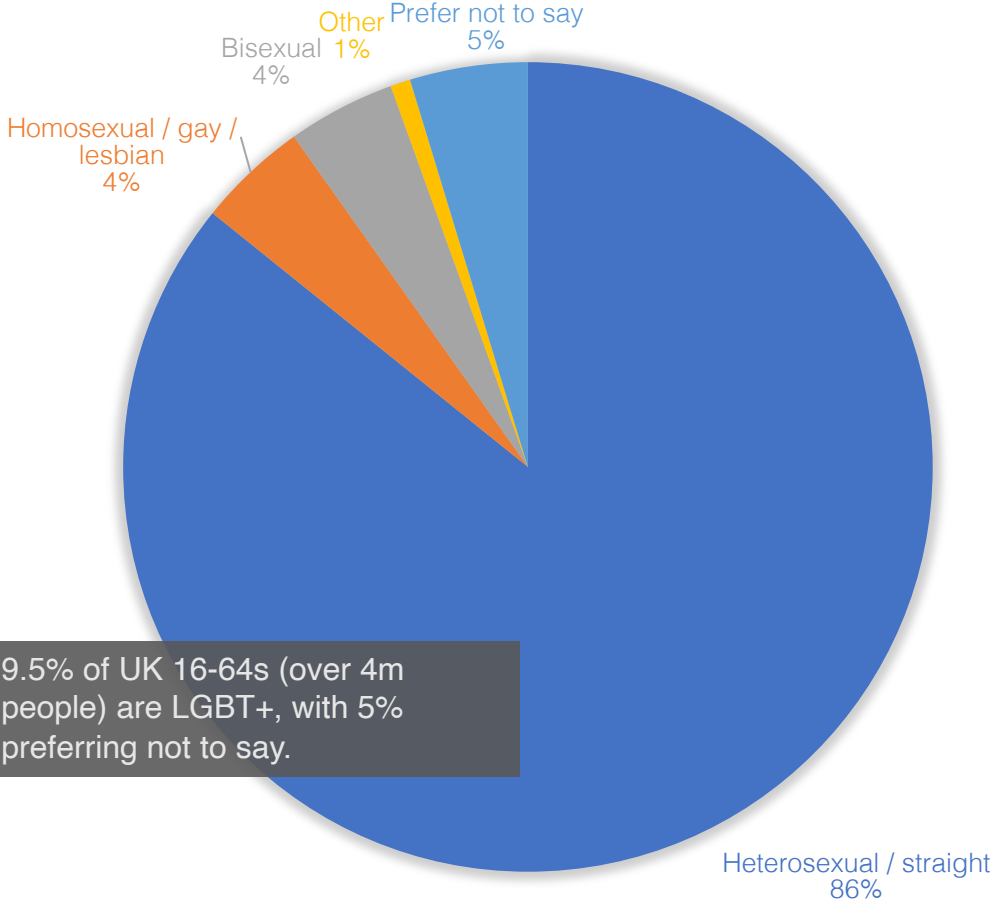
Notes

The following data is from Global Web Index, looking at UK consumers aged 16-64 with internet/mobile access over the last four waves of research (Q2 2020 to Q1 2021).

The “LGBT+” audience is defined here as all those who responded to the “What best describes your sexual orientation?” with either Homosexual, Gay, Lesbian, Bisexual or Other. Those who answered “Prefer not to say” have not been included in the audience.

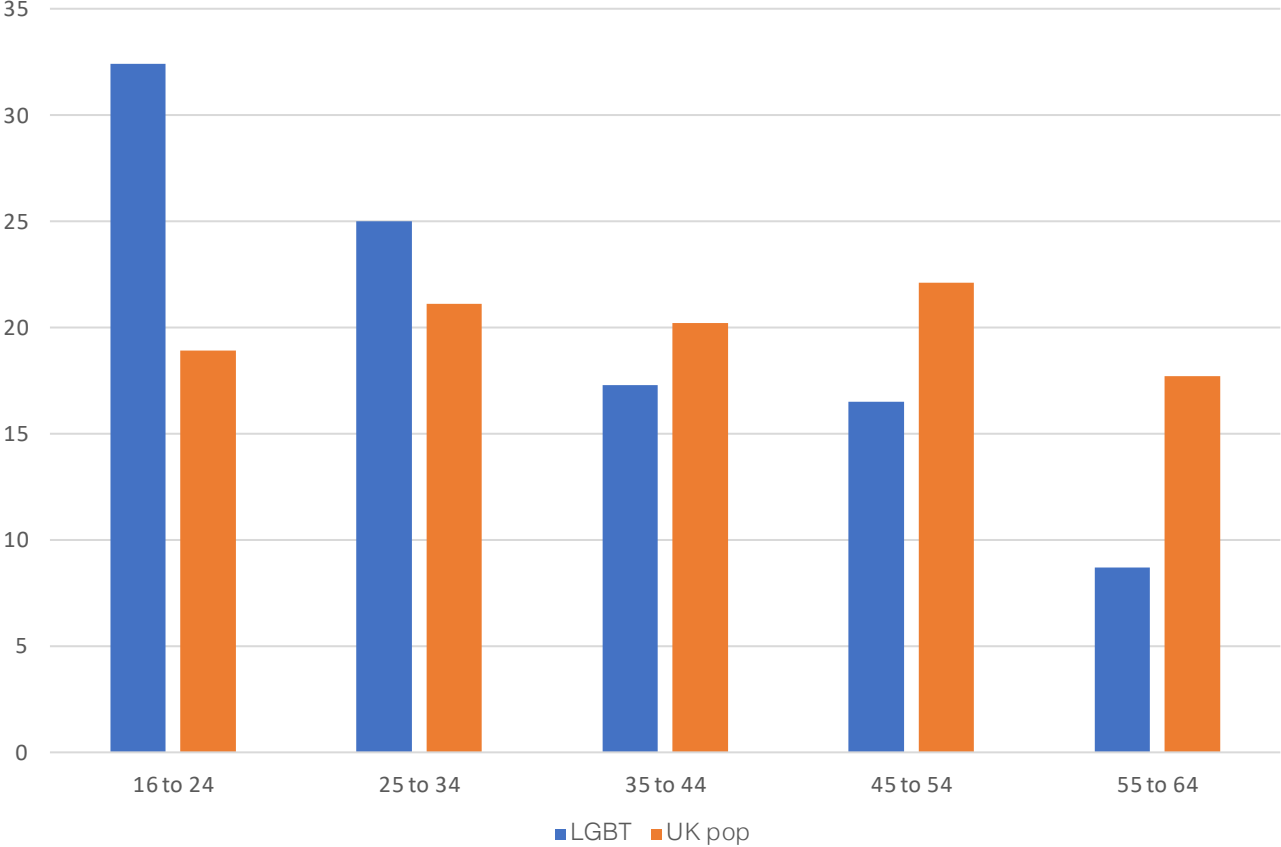
Index figures are based against the UK 16-64 audience as a whole, and segmented male/female where appropriate.

Demographics



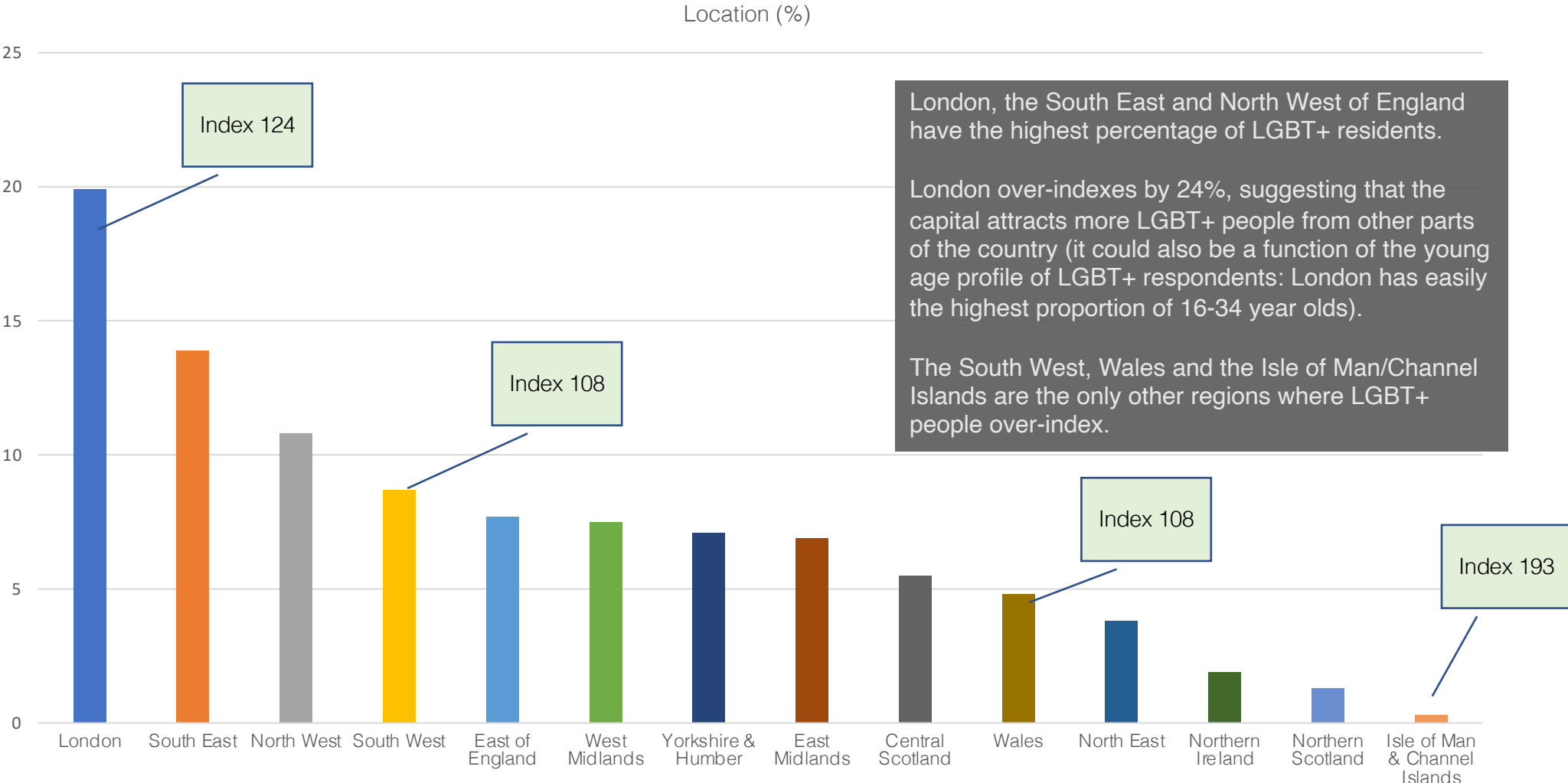
9.5% of UK 16-64s (over 4m people) are LGBT+, with 5% preferring not to say.

Age Group Distribution (%)



LGBT+ people are significantly more likely to be in the younger age groups (32% of the LGBT+ population is 16-24), compared with the UK population a a whole. This could reflect younger generations being more comfortable with acknowledging their sexuality in public (or even in an online survey).

Demographics

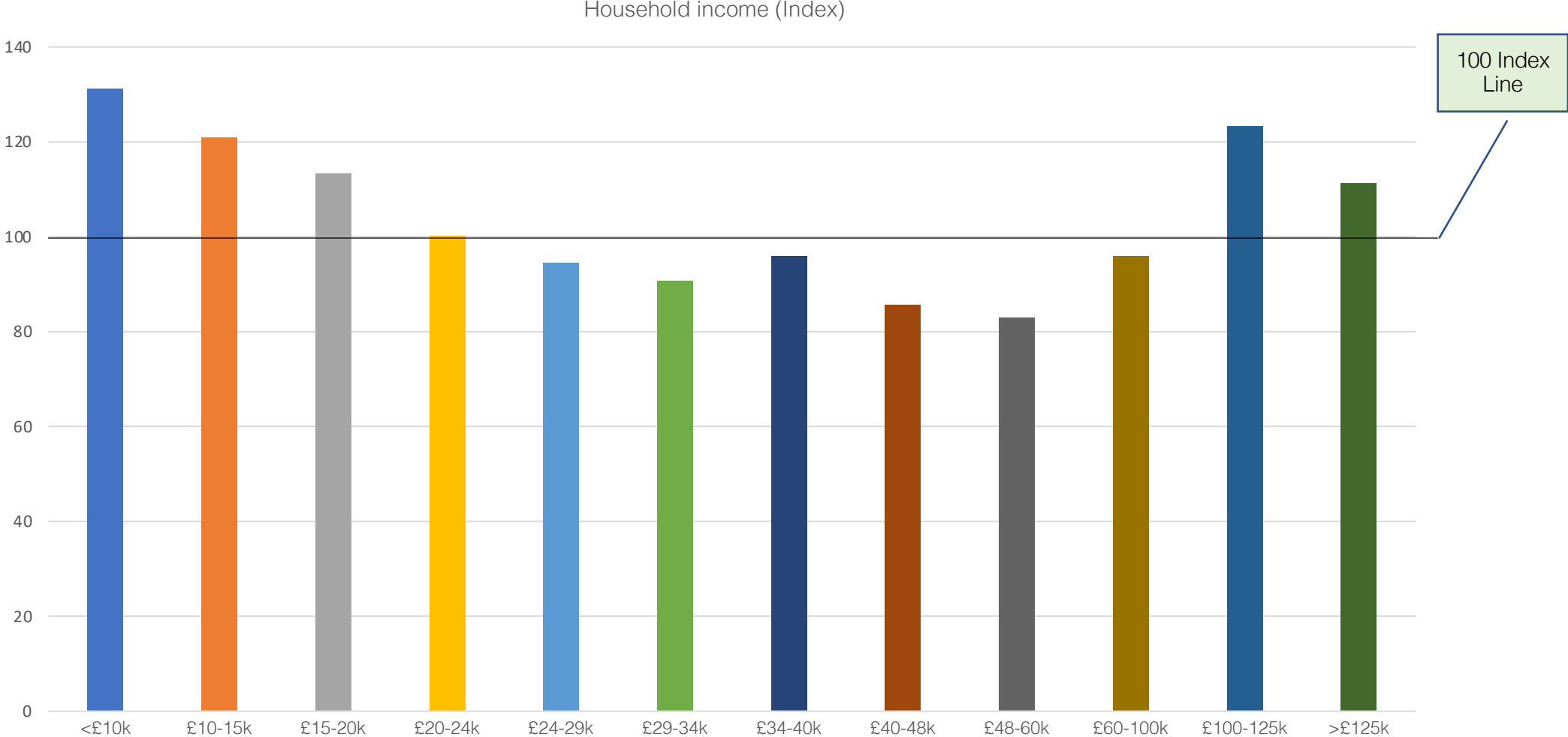


London, the South East and North West of England have the highest percentage of LGBT+ residents.

London over-indexes by 24%, suggesting that the capital attracts more LGBT+ people from other parts of the country (it could also be a function of the young age profile of LGBT+ respondents: London has easily the highest proportion of 16-34 year olds).

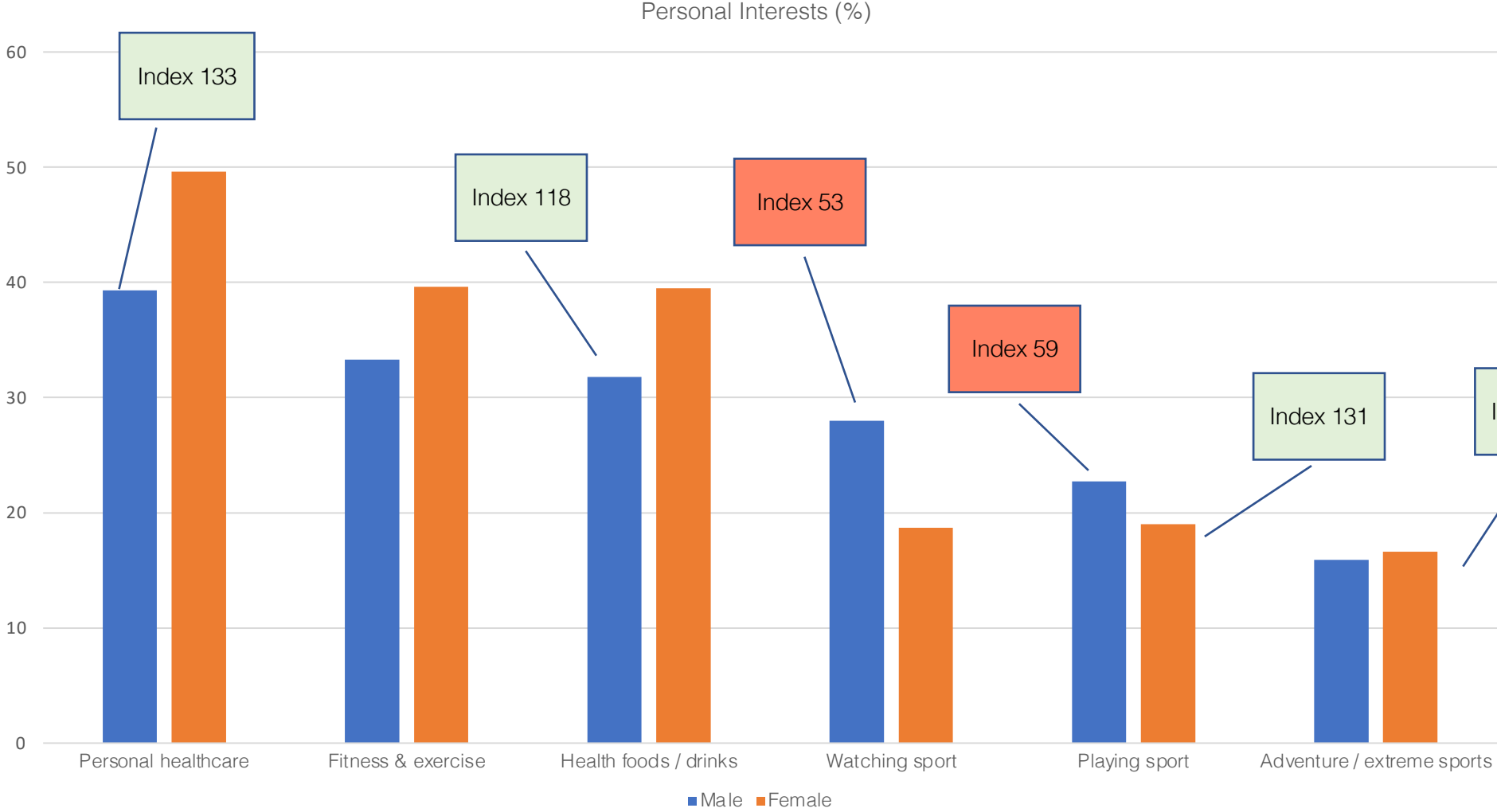
The South West, Wales and the Isle of Man/Channel Islands are the only other regions where LGBT+ people over-index.

Income and Savings



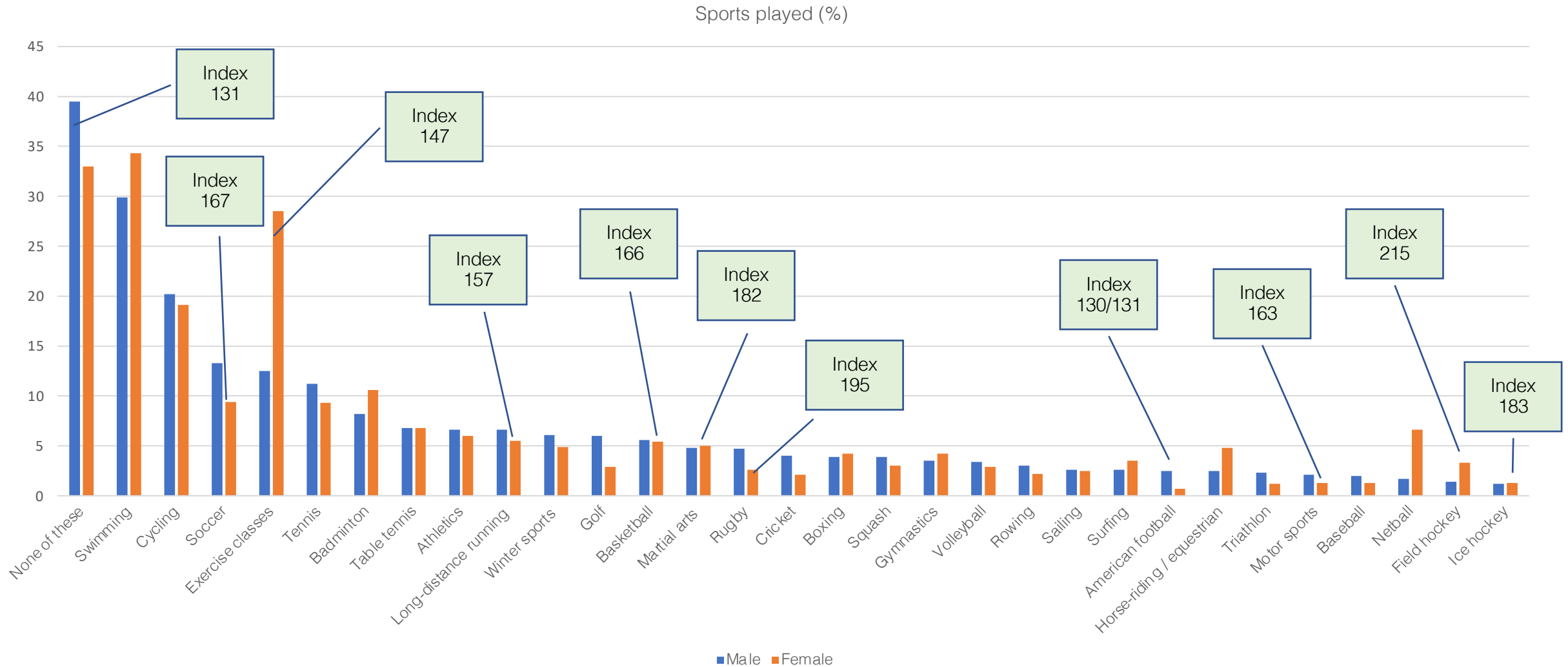
LGBT+ people over-index for the lowest incomes (under £20k), but also for the highest, with 5.6% having a household income of over £100k.

Personal interests



LGBT+ people have a high level of interest in health and fitness, with men over-indexing by 30% for personal healthcare. However, LGBT+ men under-index for both watching and playing sport. LGBT+ women over index significantly for playing sport and adventure/extreme sports.

Playing sport



Swimming and cycling are the most popular sports for the LGBT+ audience to take part in, along with exercise classes for the female audience.

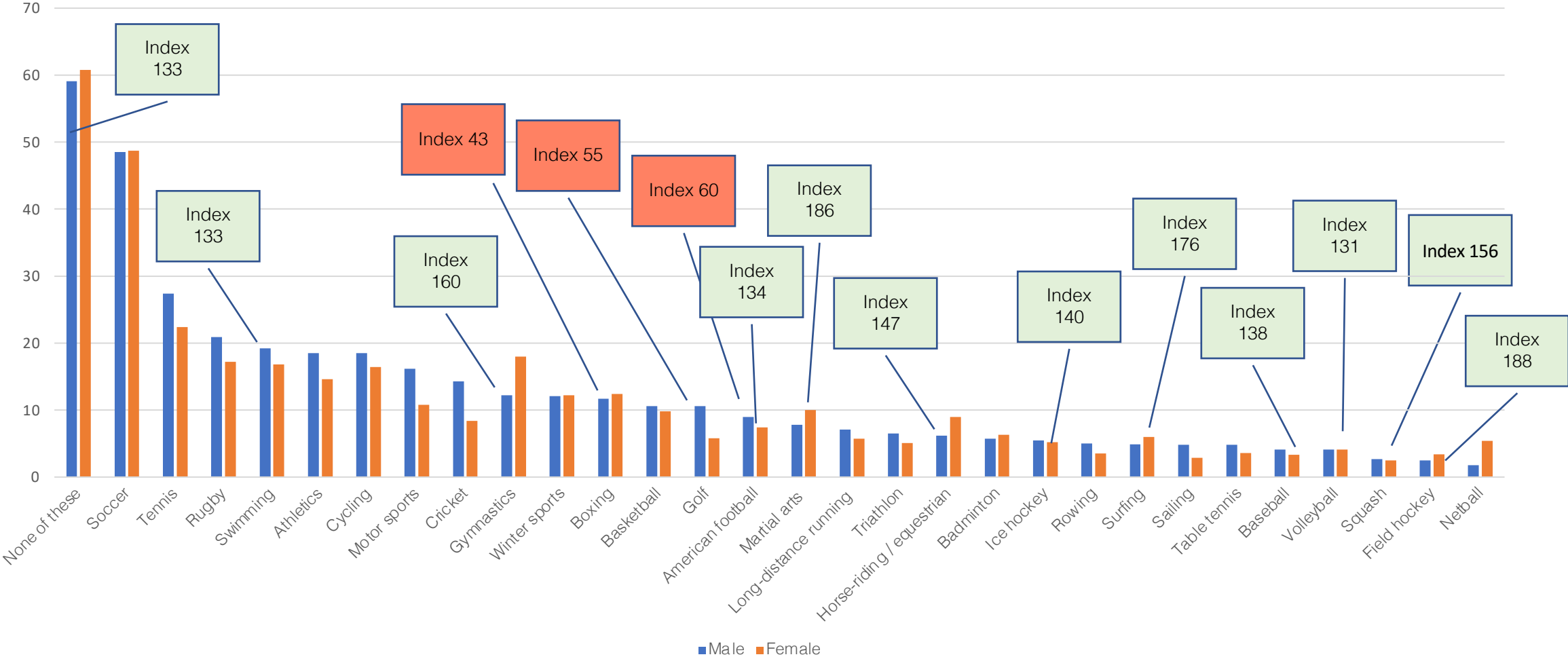
LGBT+ men are 47% more likely to do exercise classes than UK men as a whole.

While many of the percentages are low, women over-index for almost every sport, with some notably high scores.

The picture is more mixed for LGBT+ men, who are 30% more likely to do no sport at all.

Following sport

Follow, Watch on TV, Watch Online (%)

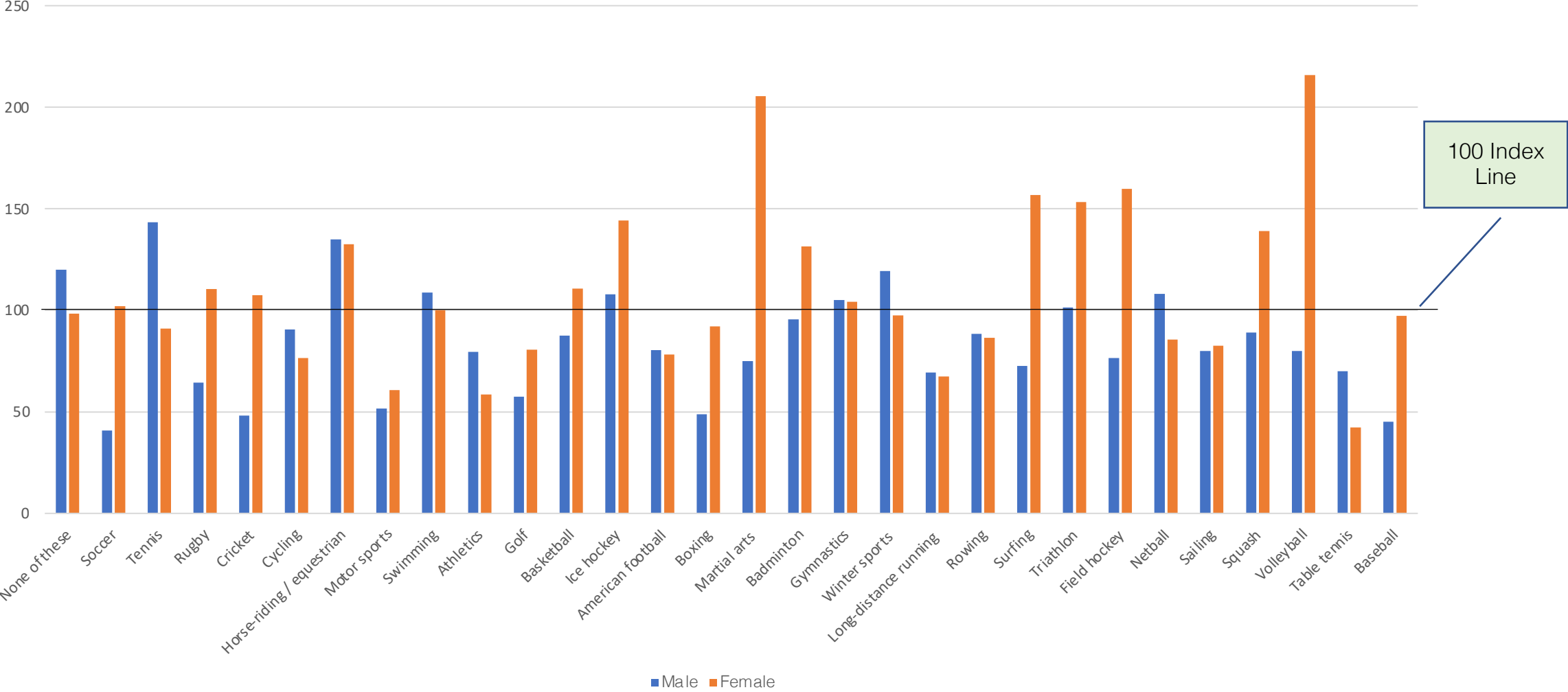


59% of men and 61% of women don't follow any sport. For the men, this is 33% higher than the average.

Again, the index figures are mixed, with sport being relatively much more popular among LGBT+ women than men. Gymnastics, equestrian and swimming are the exceptions among the men.

Attending in person

Watch/Attend in Person (Index)



When it comes to watching sport in person, LGBT+ men under-index significantly in most cases, with tennis, equestrian, winter sports and netball being the exceptions. Football is the lowest, with an index of just 41.

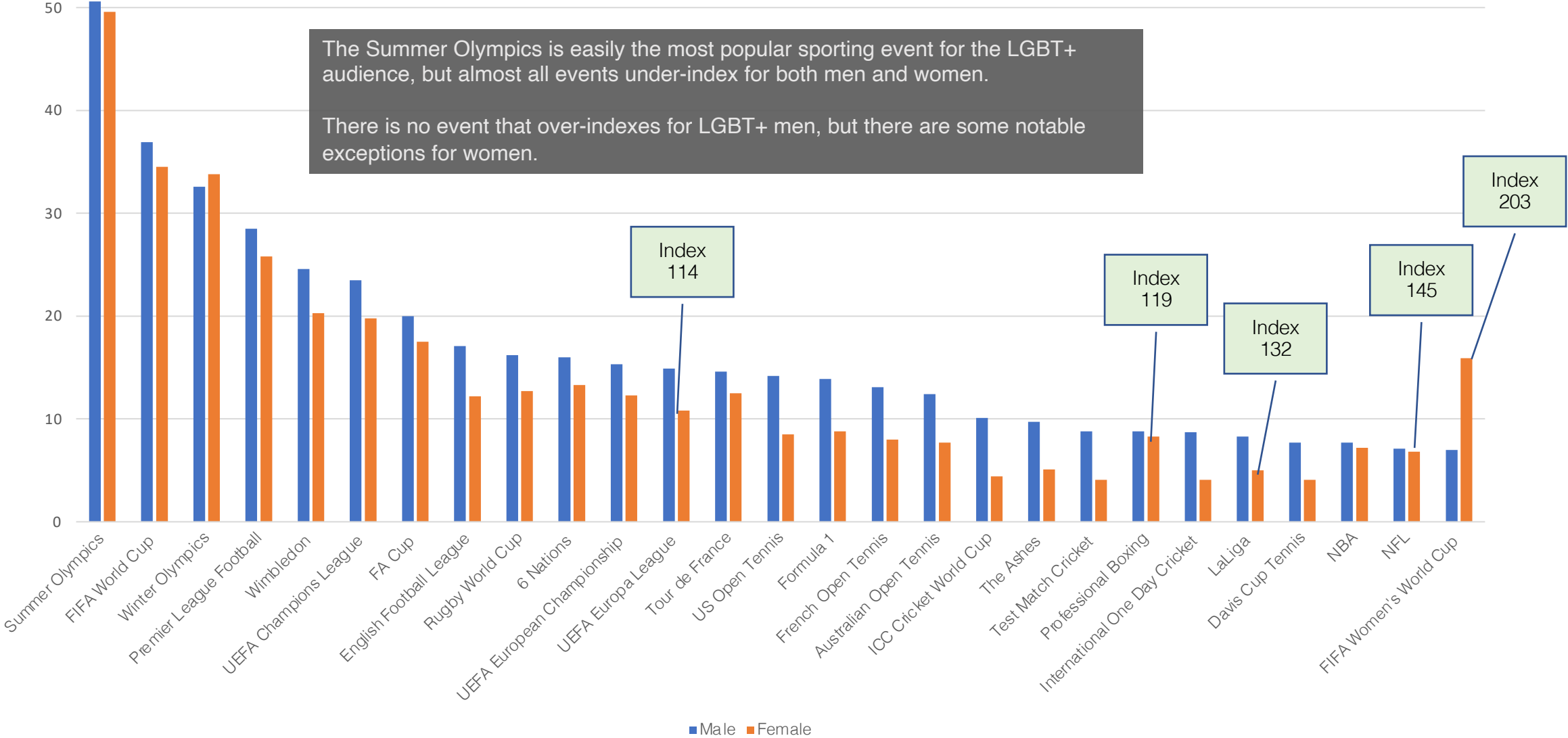
For women, it's a brighter picture with 13 of 29 sports over-indexing, including football at 102.

Sporting events

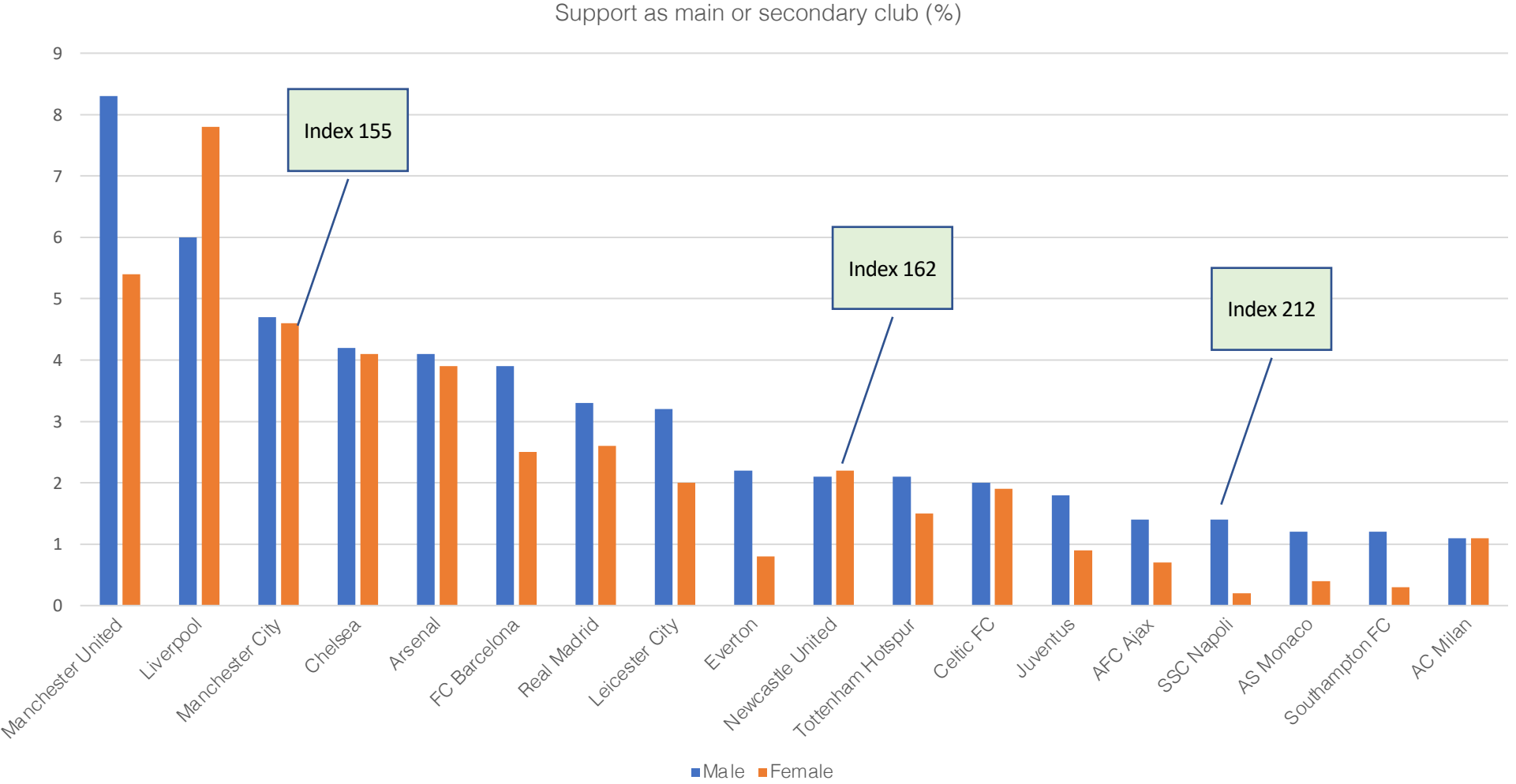
Sporting Events Watch/Follow/Interest In (%)

The Summer Olympics is easily the most popular sporting event for the LGBT+ audience, but almost all events under-index for both men and women.

There is no event that over-indexes for LGBT+ men, but there are some notable exceptions for women.

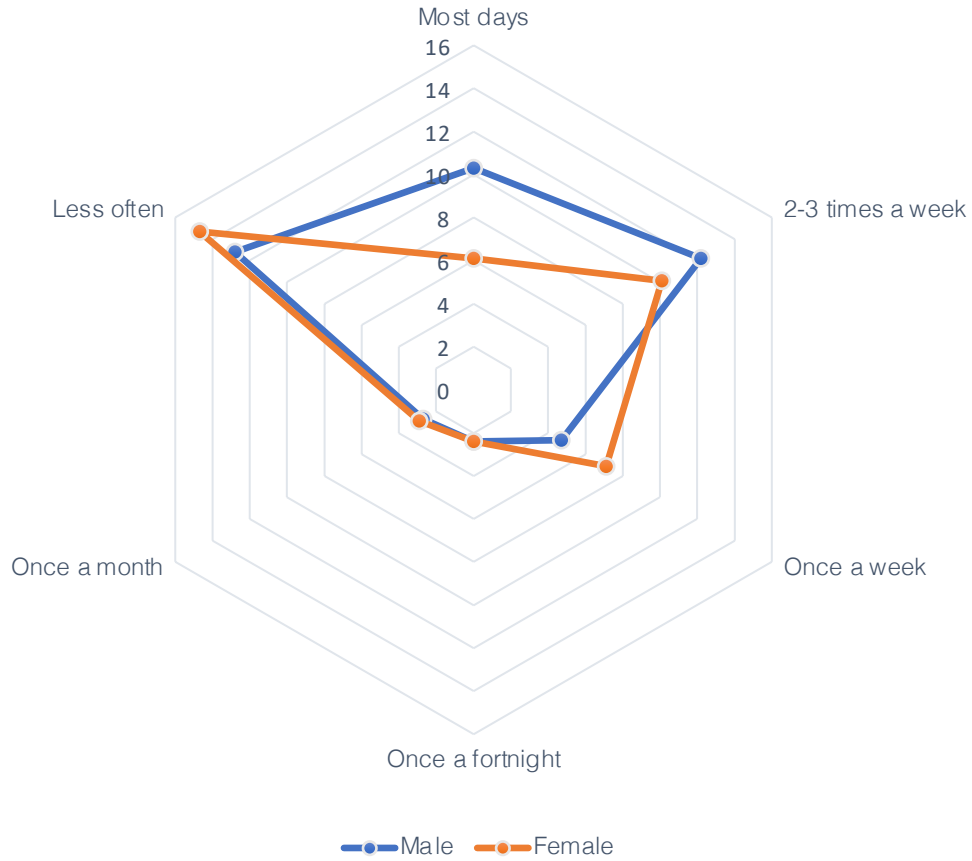


Football teams



Manchester United is the most popular football club for LGBT+ men, with Liverpool taking top spot among the women. LGBT+ women are 55% more likely to support Manchester City than the average, and SS Napoli has an index of 212 for LGBT+ men.

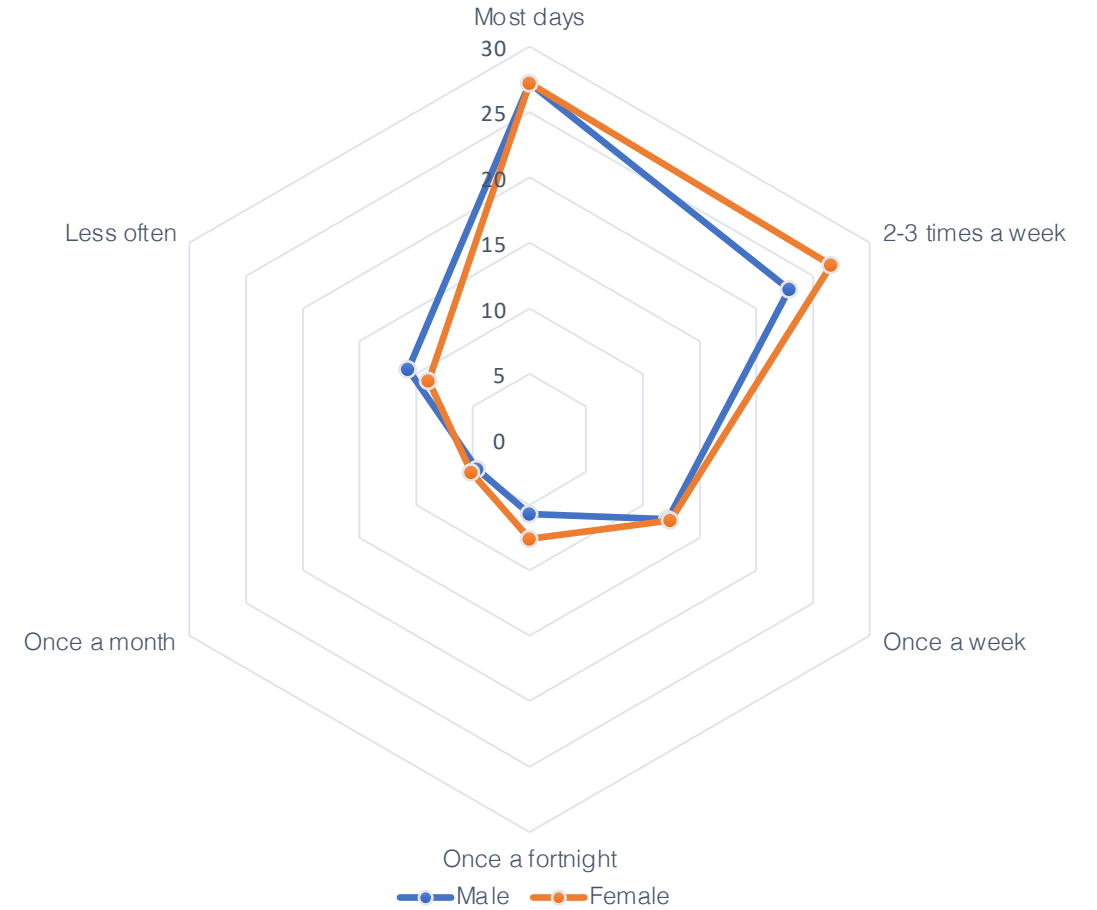
Gym attendance



45% of LGBT+ men go to the gym at least occasionally, with 22.5% going 2-3 times per week or more. This is broadly in line with the average for all men.

LGBT+ women over-index for all gym attendance, with 29% attending at least once per week.

Other exercise



62% of LGBT+ men exercise once a week or more, slightly less than the average.

For women, the figure is 66%, broadly in line with the average for all women.

Takeouts

The LGBT+ audience is clearly a sizeable one with significant spending power, but it appears that in many cases (especially for men), sport is still failing to engage and create a welcoming environment. That divide between men and women is perhaps the most striking thing in this data.

Far fewer LGBT+ men have an interest in watching sport than UK men as a whole (28% vs 53%), with another sizeable gap when it comes to playing sport (23% vs 38%).

It's a much more equal picture for women, with 19% of LGBT+ women having an interest in watching sport vs. 20% for all UK women. LGBT+ women are also 30% more likely to have an interest in playing sport.

Some sports are doing a good job of engaging LGBT+ men in participation, with the likes of gymnastics, volleyball, American football and triathlon all over-indexing. But challenges clearly remain with some of the biggest sports, including football, golf and cricket.

For LGBT+ women, the participation picture is very healthy, over-indexing for almost every sport. What is driving this difference? It could be a general perception (or a reality?) that some sports are more acceptable and welcoming for LGBT+ women than they are for men, along with a major difference in the presence of role models at the elite levels. There is still no openly gay man playing professional football in the UK, and precious few in rugby, cricket or golf. Perhaps the recent coming out of Carl Nassib in the NFL will help to encourage others to take that step.

There is no general reluctance from LGBT+ men to take part in physical activity: gym and exercise frequency matches the UK average almost exactly, and exercise classes are the one area where men do over-index (by 47%). LGBT+ men are also more likely to have a general interest in personal healthcare. There has to be an opportunity for more sports to convert more of this interest in health and physical fitness into involvement in sport. (NB: LGBT+ women are slightly more active than the overall female population).

When it comes to following sport, we see a similar male/female divide, with many more sports over-indexing among LGBT+ women than men. For the men, we again see some low index figures for the biggest sports - football (64), rugby (70), cricket (53) and golf (55). There is much work to do.

This trend continues through to engagement with the major sporting events and leagues, with most of the major properties under-indexing for both LGBT+ men and women.

Going along to watch sport in person is perhaps the ultimate test of whether a LGBT+ person feels comfortable and welcomed.

Once again, it's a more positive picture for women with an average index across all sports of 109 (9% above the average). For LGBT+ men this figure is just 83 (17% below average) and once again some of the biggest sports performing the worst: football (41), cricket (48), golf (57) and rugby (64). Tennis is a notable exception for men, with an index of 143.



OVERDOG

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