

A BIGEYE 2021 NATIONAL STUDY

TRANS

BEYOND THE BINARY

AMERICANS' ATTITUDES, LIFESTYLES, PURCHASING BEHAVIORS, AND THE
IMPLICATIONS FOR ADVERTISERS AND MARKETERS

Foreword

When I was growing up in the 1970s, newborn kids were typically given pink or blue blankets at the maternity ward to signify their sex. Children's birthday party gifts were as predictably gender normative as the times: G.I Joe for the boys and Barbie for the girls. Times have changed and gender does not necessarily define a person as it used to.

In a year that saw pandemonium unleashed by a pandemic, a bitterly contested Presidential election, and global protests in the quest for social justice, the 2020 US Census was conducted. It provided only two options for respondents to classify their gender - male or female. This was a missed opportunity: Without hard data on the numbers of people who are transgender or identify as nonbinary, it's difficult to make a case for services or policies that protect people against discrimination. As one of our nonbinary study participants noted, "If you're not counted, you don't count."

A 2016 study from the Williams Institute at the UCLA School of Law estimated that around

0.5% of Americans identify as transgender or gender-nonconforming, which equates to about two million people.

To understand whether or not depictions of traditional gender roles in advertising influence brand perceptions, and to quantify consumers' opinions about gendered products, Bigeye undertook a national study, the results from which you are reading now.

So why would Bigeye want to reflect on the influence of a group that is estimated to make up less than one percent of the population? Because, as Dr. Marie-Claude Gervais, Director of Research at Versiti recently said on an episode of our

podcast, In Clear Focus:

"People who belong to minority groups are particularly interesting because if you understand their needs, you get things right for the majority of the population as well. Getting things right for a minority can really serve the needs of a majority."

I hope you enjoy our contribution to the conversation about achieving greater diversity, equity, and inclusion in advertising. 2021 is shaping up to be a pivotal year for brands and an opportunity to show they are really listening to their customers - and reflecting their values.

Justin Ramb, CEO

Introduction

In December 2020, Elliot Page, the Oscar-nominated star of movies like “Juno” and “X-Men: Days of Future Past” shared with fans that they are transgender and identify as nonbinary.

Page joined a growing number of celebrities who identify as nonbinary, including singer Sam Smith, “Billions” star Asia Kate Dillon, “Transparent” creator Joey Soloway, and actor Sara Ramirez, best known for playing Dr. Callie Torres on “Grey’s Anatomy”.

While the majority of people do live in their “cis” gender - that is, the one assigned to them at birth - for a significant percentage of younger generations, the notion of identity is fluid and decidedly non-traditional. Gender identity is something felt, while gender expression is seen as a choice. And both might be different from the sex a person was assigned at birth.

To understand how Americans feel about gender beyond the binary of male and female, Bigeye undertook a national study involving over 2,000 US

consumers aged 18 and over. We adopted a mixed-methods approach, commencing with a qualitative study that engaged a group of nonbinary, transgender, genderqueer, and genderfluid participants via an online research platform. Over a period of three days in mid-September, we asked questions about participants’ day-to-day experiences and observed their responses to a series of interactive tasks. Their candor and willingness to discuss deeply personal issues were much appreciated by the Bigeye team.

Insights from the qualitative research sensitized us to many of the issues that this community faces, and helped inform the design of a 72-question online survey for the second phase of the research. Distributed to a nationally representative sample of 2,000 US adults in December 2020, the quantitative results provide a snapshot of the

broad spectrum of opinions and beliefs held in America today.

As you’ll read, respondents’ generations, faiths, political affiliations, and orientation all influence how gender is understood, expressed, and the extent to which non-traditional and gender-neutral toys, education, restrooms, and consumer products are supported.

We hope you find the consumer insights yielded by the study interesting and that the report adds to your organization or brand’s understanding of gender - beyond the binary.

Adrian Tennant, VP, Insights

Definitions

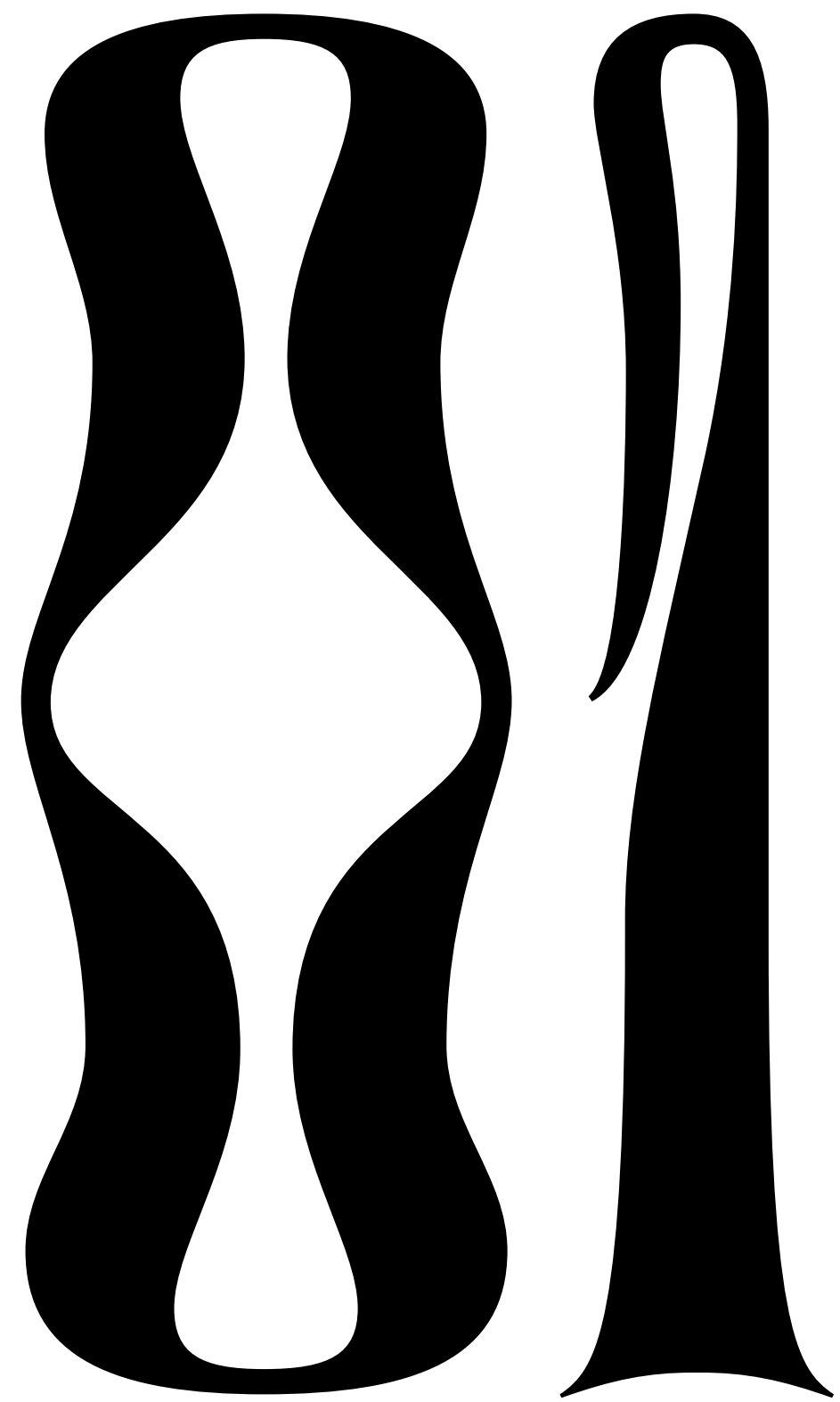
Gender identity is an individual’s perception of themselves as male, female, a combination of both, or neither.

Gender expression is the external appearance of one’s gender identity, usually through behavior or outward appearance.¹

Reference guide to the generational cohorts and distributions referred to in this report:

Ages 18-24 Gen Z <i>n</i> = 418	Ages 25-39 Gen Y <i>n</i> = 468	Ages 40-55 Gen X <i>n</i> = 428
Ages 56-74 Boomer <i>n</i> = 482	Ages 75 + Silent Generation <i>n</i> = 161	

1. Human Rights Campaign. “Sexual Orientation and Gender Identity Definitions.” HRC. Accessed January 13, 2021. <https://www.hrc.org/resources/sexual-orientation-and-gender-identity-terminology-and-definitions>.



DEFINING GENDER

Bigeye National Study 2021 | Gender: Beyond the Binary

BEYOND THE BINARY



QUESTION 14

A Person Is Either a Man or a Woman and Not Anything in Between

To quantify how well understood - and accepted - differences between sex and gender identity are, we asked respondents to indicate the extent to which they agree or disagree with a series of statements.

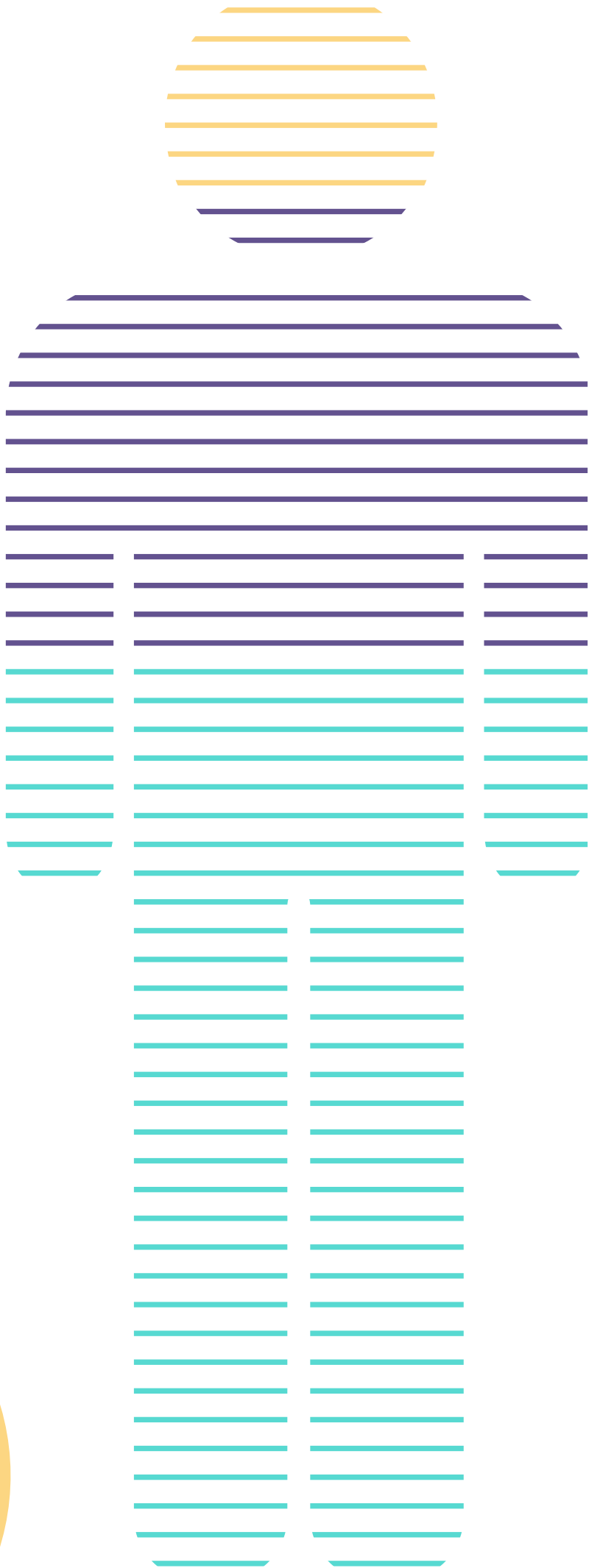
While a clear majority of respondents overall agree with the assertion that biological sex is binary (58%), almost one-quarter disagree with the statement (24%), while 17 percent are neutral.

Respondents most likely to agree with the statement include those of the Silent Generation, (those aged 75 and older) of whom almost two-thirds agree (64%), as well as three-quarters of male cisgender parents without any college education (76%), two-thirds of respondents located in the South (66%), and those who identified their religious affiliations as Anglican

(82%), Episcopalian (83%), Mormon (80%), Quaker (80%), Baptist (78%), or Evangelical (77%). Agreement is weakest among Generation Z, at just under one-half (49%).

Respondents who disagree with the statement include those who identify as Agnostic (43%) and Atheist (40%), one-third of those who live in the Northeast (33%), and more than one-quarter of cisgender female parents with some college education (29%).

But at 46 percent, LGBTQIA+ respondents are the most likely to disagree - 35 percent strongly. Members of the community include people who are assigned Intersex at birth, as well as people who transition from one sex to another, with or without surgery.



17%

Neither Agree nor Disagree

24%

Strongly/Somewhat Disagree

58%

Strongly/Somewhat Agree

LGBTQIA+ Defined

This cohort includes quantitative survey respondents:

Who identify their assigned sex at birth as Intersex

Whose gender identity is different from the sex assigned to them at birth

Who select their gender identity as nonbinary, male-to-female transgender, or female-to-male transgender, or other, such as genderqueer, genderfluid, or agender

Who indicate their sexual orientation is Lesbian, Gay, Bisexual, or Asexual



QUESTION 14

Gender Is Not Binary - There Is a Spectrum of Gender Identities

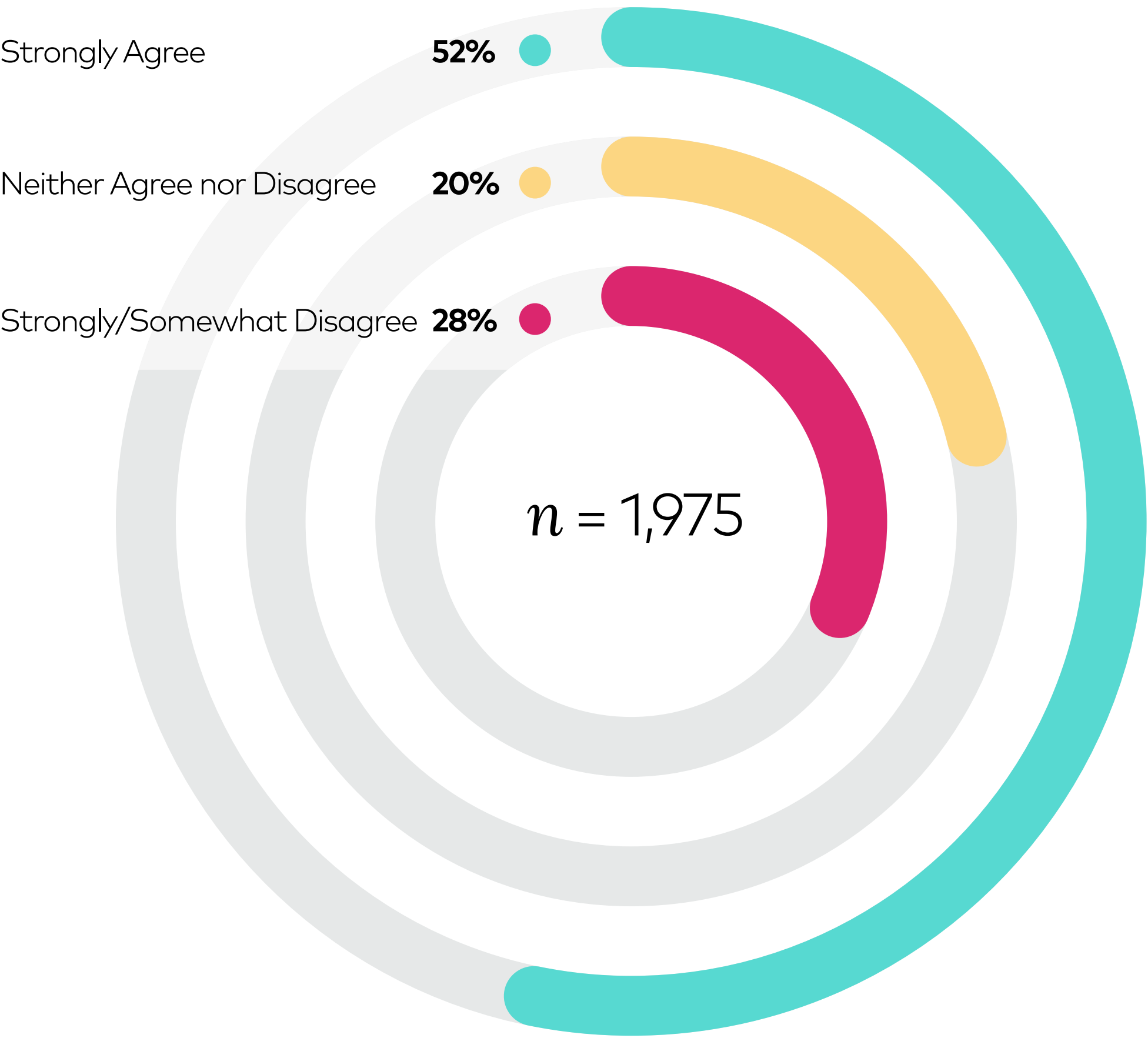
While the preceding statement focused on biological sex, survey results indicate that when it comes to gender identity, a little over one-half of respondents agree with the idea of something other than a traditional, binary definition (52%).

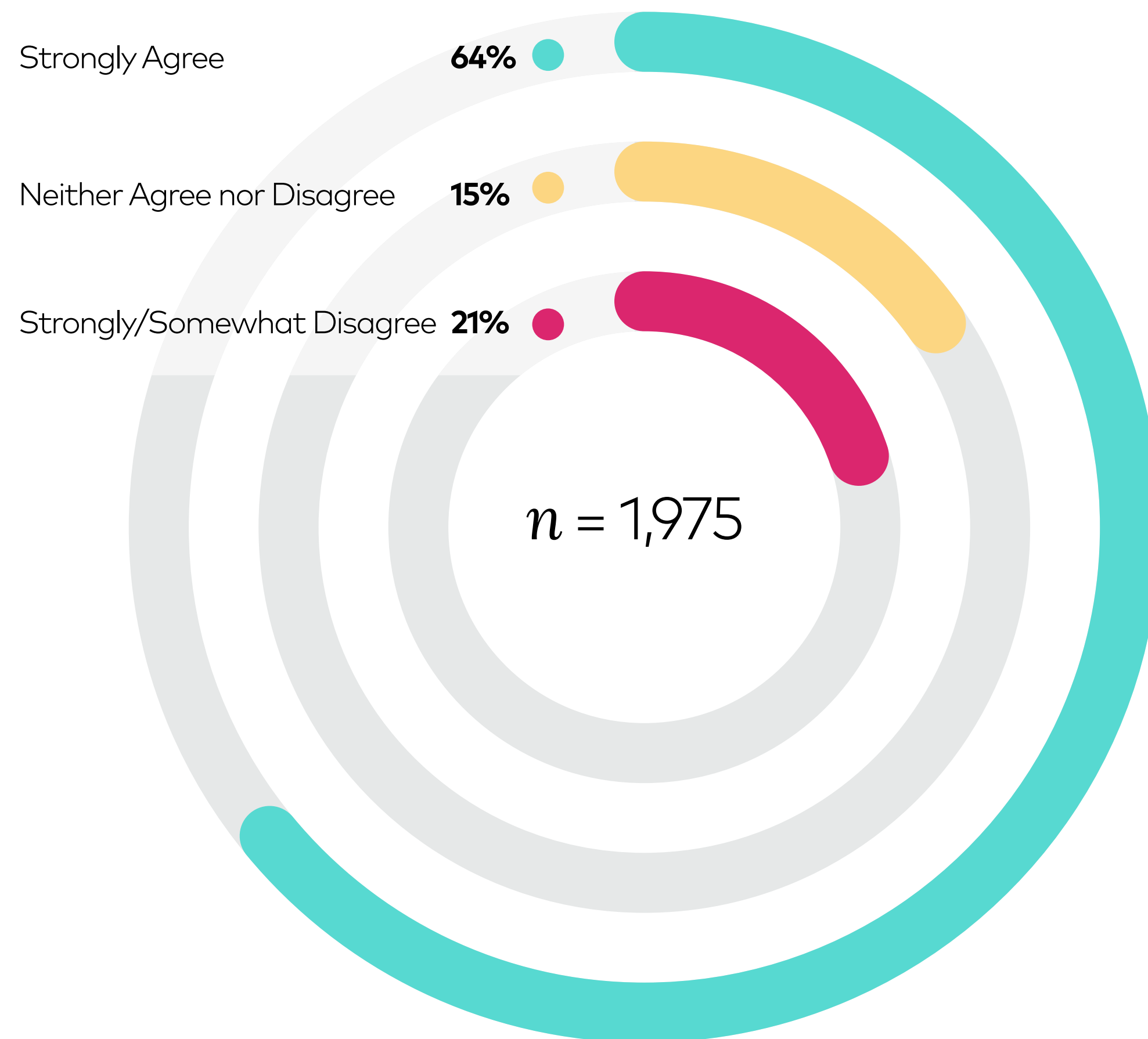
More likely than others to **agree** that gender is a spectrum include respondents who live in the West (56%), cisgender male² parents without college education (59%), those who belong to Generation Y - also known as Millennials (62%), and LGBTQIA+ people, almost two-thirds of whom agree (65%).

This community includes people who identify as nonbinary, genderqueer, and genderfluid - and perhaps more sensitized to issues around gender identity.

Agreement with the idea that gender encompasses a spectrum of identities is weakest among the Boomer Generation, over one-third of whom disagree (35%), as well as 32 percent of respondents who live in the South.

2. Cisgender describes those respondents whose sex assigned at birth is consistent with their gender identity (i.e. a person assigned the sex "female" at birth who also identifies their gender identity as female)





QUESTION 15

Gender Is Defined by the Reproductive Organs You Are Born With

Approaching two-thirds of respondents agree that gender is defined by a person's reproductive organs (64%). Most likely to agree are respondents who identify as male (72%) compared to 57 percent of those who identify as female, plus the oldest respondents in our study - those of the Silent Generation (72%). Among the youngest respondents, Generation Z, only 54 percent agree.

Regionally, agreement is higher than average among respondents in the South and Midwest (both at 67%) and those who identify as Anglican (80%), Baptist (77%), Episcopalian (77%), Evangelical (88%), Methodist (78%), Mormon (80%), Muslim (76%), or Protestant (79%). Among parents, male and cisgender female respondents

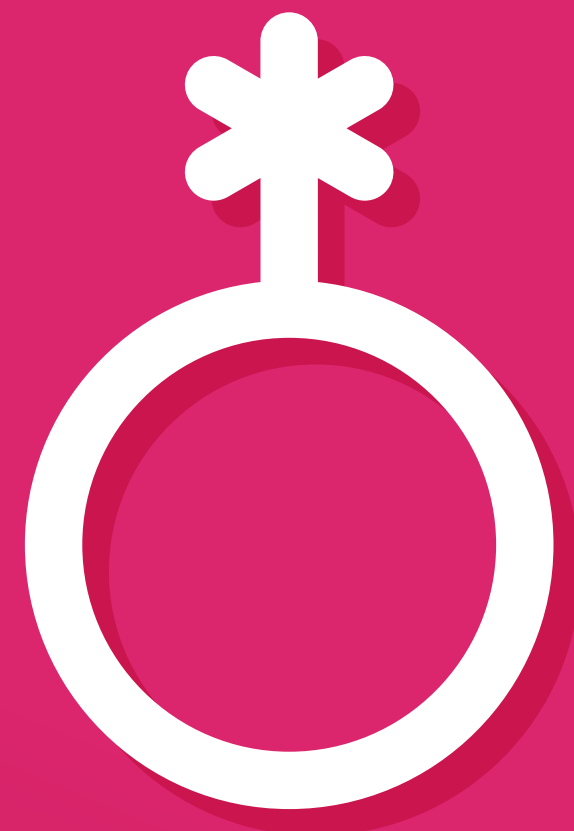
are only a few points apart. Among transgender respondents, one-third agree with the statement (33%), perhaps reflecting challenges they have faced, or foresee.

More likely to disagree are respondents who live in the Northeast (25%) and in the West (22%), those who identify as Agnostic (47%) or Atheist (36%), and members of the LGBTQIA+ community (43%). Although a small sample size, 44 percent of respondents who identify as female-to-male transgender disagree, compared with 56 percent of male-to-female transgender - while among respondents who identify as nonbinary, 57 percent disagree.



Transgender

Transgender people are those whose gender identity differs from the sex they were assigned at birth. The term "trans" is preferred by some individuals.



Nonbinary

Nonbinary indicates a gender identity or expression that is neither entirely male nor entirely female.



Genderqueer

Gender nonconformity reflects deviation from conventional norms for masculinity and femininity. Some individuals prefer to use the term "gender non-conforming".



Genderfluid

Genderfluid people experience a gender identity that is not fixed, who may feel a mix of both genders, and/or more male on some days and more female on others.

“I was raised in a religious home; my family members often expressed disapproval for my ‘acting and talking feminine’ through their words and attempts to sway me to act more boyish/masculine.”

CT, nonbinary, Gen Y, Northeast

“My gender has not fit my body for as long as I can remember. My religious upbringing included rigid gender roles and I hated the role I was expected to fulfill. I had to wear dresses and skirts and I could not cut or even trim my hair. The best memory I have from my childhood is when I was allowed to wear jeans with my Halloween costume. Due to my mannerisms and the fact that my mask hid my hair, a woman thought I was a boy. It felt amazing.”

AS, genderqueer, Gen Y, Northeast

“I have always been gender-nonconforming. I probably first realized - not that there was something different about me, but that people viewed gender in a very specific way - as a small child. I didn’t understand why there were two bathrooms for girls and boys.”

EW, genderqueer, Gen Y, South

“I knew my sense of gender was different from childhood. I would go out in shorts to swim at the beach as a three-year-old. I did things, like fishing, running, or playing in mud, that made people think I was masculine. As I got older, I thought I might be trans and might want to fully transition, but I knew that wouldn’t work for me, either. I thought part of myself would still be unfulfilled.”

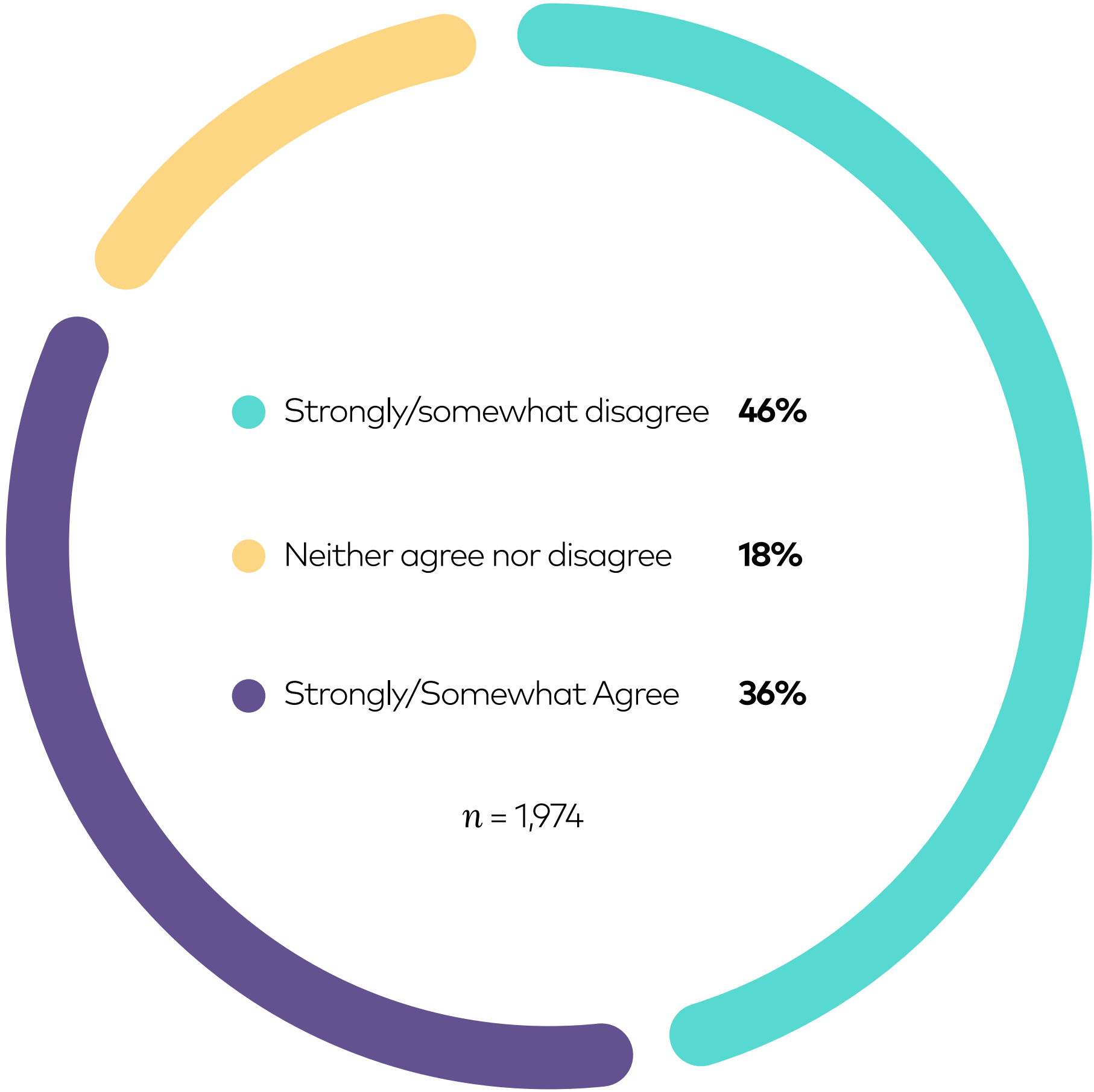
FM, genderfluid, Gen Y, Northeast


QUESTION 17

In Public Places, Restrooms Should Be Gender-Neutral, Not Gender-Specific

Our national survey responses show a little under one-half of respondents disagree with the idea of gender-neutral restrooms in public places (46%). Older generations are the most likely to disagree: 53 percent of Boomers and 63 percent of the Silent Generation disagree with the idea. Respondents' political affiliations also influence their attitudes, with two-thirds of Republicans disagreeing. From a faith perspective, the most likely to disagree identify as Evangelical (63%), Methodist (66%), and Protestant (64%). Cisgender male respondents without any college education are 12 points more likely to disagree (64%) than their female counterparts (52%).

In contrast, almost one-half of Generation Y shows support for gender-neutral restrooms (48%), along with just over one-half of respondents who identify as Democrats (51%). Close to three in every five LGBTQIA+ respondents agree (57%). Faiths that are most likely to support the idea are predominantly non-Christian: 46 percent of respondents who identify as Buddhist agree, along with Hindu (48%), Jewish (46%), Agnostic (45%) - with two-thirds of those who identify as Muslim in agreement (66%). Surprisingly, Generation Z - the cohort that has the most recent experience of school life - is split down the middle on this issue: 39 percent agree, while 38 percent disagree.





TRANS

UCLA's Williams Institute estimates that the United States has around **150,000 transgender youth** between the ages of 13 and 17. Obama-era protections jointly directed by the Education and Justice departments allowed transgender students in public schools to use bathrooms that correspond with their gender identity but, in 2017, the Trump administration reversed those protections, making them an issue for individual states to decide. According to the ACLU, denying transgender people the right to use a gender identity-appropriate restroom is a violation of discrimination laws.³

3. CNN. "Trump's Reversal on Transgender Bathroom Directive: How We Got Here." CNN Digital, February 23, 2017. <https://www.cnn.com/2017/02/23/health/transgender-bathrooms-trump-q-and-a/index.html>.

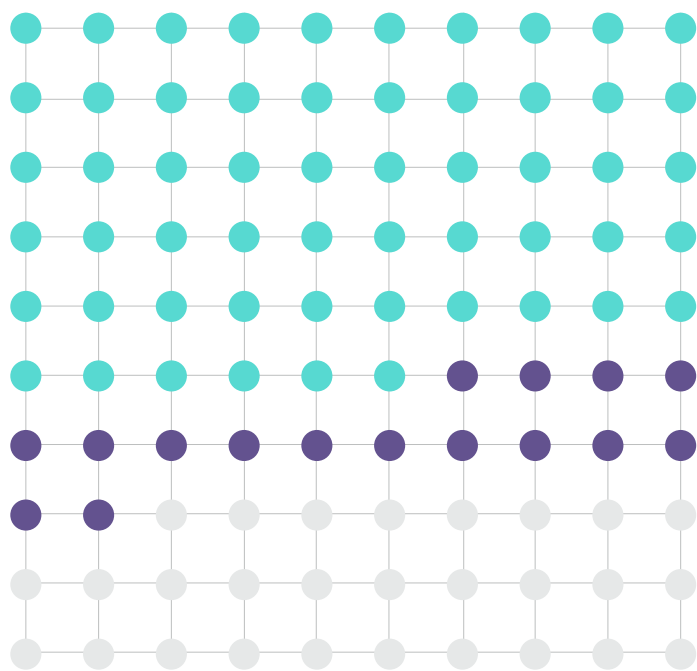
One of the factors likely to influence respondents' awareness of issues around gender identity is whether or not they know someone who identifies as transgender, nonbinary or nonconforming, or as genderfluid.

While overall, the majority of respondents do not know anyone who identifies with these genders, some groups are much more likely than others to do so - notably Generation Z, among whom 27 percent have a friend who identifies as transgender, 23 percent have a friend who identifies as nonbinary or gender non-conforming, and 14 percent report having a friend who identifies as genderfluid.

LGBTQIA+ respondents are the most likely of all to know people who identify with these genders: 35 percent have a friend who identifies as transgender, one-third have a friend who is

nonbinary or gender non-conforming (33%), and one-fifth report having a friend who identifies as genderfluid (20%). This group includes people who themselves identify as transgender (6%), nonbinary or gender non-conforming (7%), and genderfluid (8%).

Least likely to know someone who identifies with these gender definitions are respondents from older generations: 72 percent of Boomers and 80 percent of the Silent Generation don't know any transgender people. Eighty-eight percent of the Silent Generation don't know anyone who identifies as nonbinary or gender nonconforming, and 85 percent of Boomers do not know anyone who identifies as genderfluid.



QUESTION 18

Do You Know Someone Who Identifies as Transgender?

- No, I don't 56%
- Yes, a friend of mine 16%

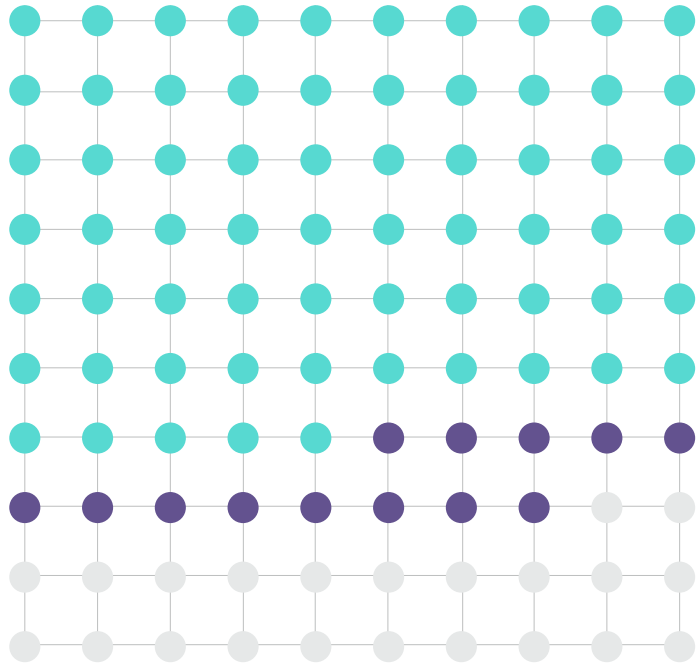
n = 1,974

QUESTION 19

Do You Know Someone Who Identifies as Nonbinary or Gender Nonconforming?

- No, I don't 65%
- Yes, a friend of mine 13%

n = 1,973

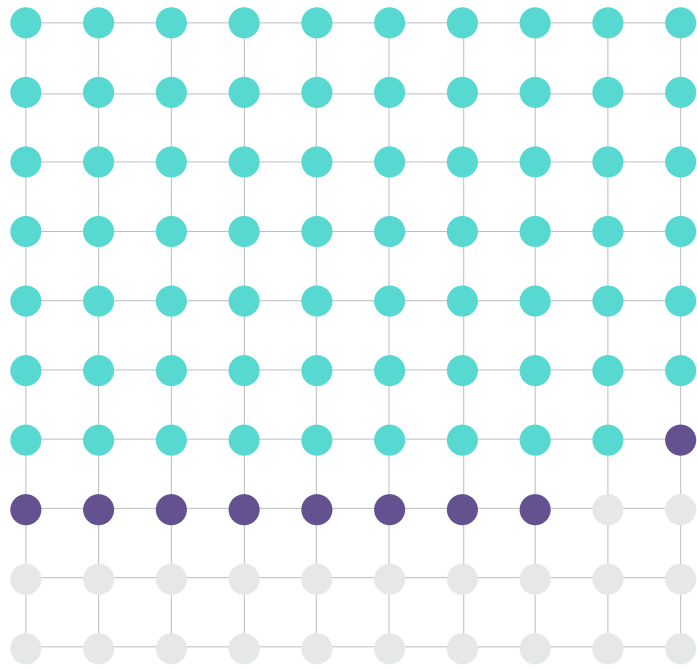


QUESTION 20

Do You Know Someone Who Identifies as Genderfluid?

- No, I don't 69%
- Yes, a friend of mine 9%

n = 1,973



The Science

Gender identity and biological sex are not the same. Sex is a function of biological traits, the most prevalent of which are the chromosomes a person is born with. Most men are born with 46 "XY" chromosomes, while most women are born with 46 "XX" chromosomes. Sex distinctions also take into account factors like hormone balances and physical traits. Babies are assigned a sex at birth based on their reproductive organs - either male or female.

However, an estimated 1-2 percent of people are born with reproductive anatomy that cannot be categorized as simply "female" or "male." They may have both ovarian and testicular tissues, or chromosomes that differ from the binaries noted above (e.g. XXY), or be born with external genitals that fall into the binary categories of male or female, but have internal organs or hormones that do not.

In the US, it is typical for doctors and family members to decide on a sex, either male or female, and raise an intersex child as the gender expected of that sex. Surgery may occur and/or the child will be given hormones to make them "fit" into male/female categories as they go through puberty.

Intersex is an umbrella term for differences in sex traits or reproductive anatomy. Intersex people are born with these differences or develop them in childhood. There are many possible differences in genitalia, hormones, internal anatomy, or chromosomes, compared to the usual two ways that human bodies develop.⁴ Our society treats intersex as a medical problem instead of a natural, healthy way bodies can be. Today, more and more people believe unnecessary surgery and other medical interventions shouldn't be done on intersex babies and children at all. Instead, intersex people should be able to decide for themselves when they're older if they want treatment or surgery.

The World Health Organization states that **gender**, on the other hand, "is a social construction that varies across different cultures and over time."

The WHO goes on to explain that, "while not all cultures break down issues of gender in binary terms, it is typical to describe gender 'in terms of masculinity and femininity.'"

Gender is a fluid term that could mean something entirely different depending on who you're talking to and in what part of the world you talk to them.

4. interACT: Advocates for Intersex Youth. "What Is Intersex? Frequently Asked Questions." Accessed December 28, 2020. <https://interactadvocates.org/faq/>.




The Devotional Music of Ana Roxanne

Musician Ana Roxanne was raised in the Catholic church by south-east Asian immigrant parents in California - she is also intersex.

Roxanne has said that her intersex identity informs all her compositions and she reflects her personal experiences in her ambient music. Influenced by choral music in both Christian and Hindustani traditions, her second album, *Because Of A Flower*, combines sparse yet haunting vocals, including this lyric:

"Ying, the female principle, and yang, the male principle / These two have joined and out of their junction has come a third / Harmony"

Listen: <https://anaroxanne.bandcamp.com>



Wendy Carlos:

Composer, Trans Pioneer

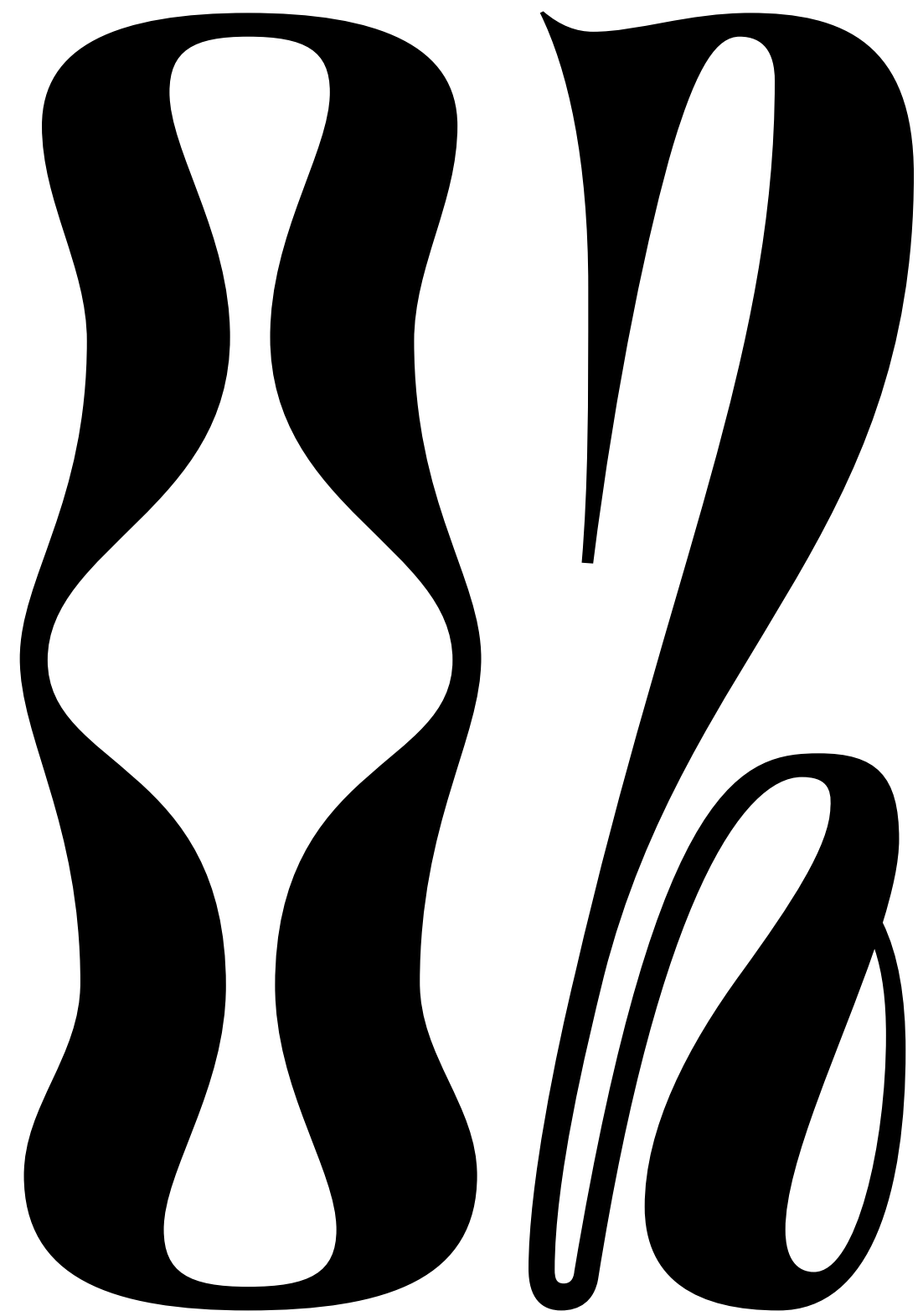
Composer and electronic music pioneer Wendy Carlos introduced the world to the sound of the Moog synthesizer with her best-selling renditions of classical music, starting with **Switched-On Bach**.

The album sold over 1 million albums when it was first released in 1968. Wendy Carlos has also composed many film scores, including **A Clockwork Orange**, **The Shining**, and **Tron**.

But Wendy Carlos is also a gender pioneer, becoming one of the first openly transgender musicians in the 1970s. Wendy was born as a male, and named Walter by her parents, but suffered terribly from gender dysphoria as a child.⁵ Her first album was released under the name Walter, before she sought gender reassignment surgery.

A long list of musicians have publicly acknowledged being influenced by Wendy Carlos's **Switched-On Bach**, including the "Father of Disco", Giorgio Moroder, space music pioneer Tomita, Keith Emerson, and Rick Wakeman, among others.

5. Gender dysphoria: The feeling of discomfort or distress that might occur in people whose gender identity differs from their sex assigned at birth or sex-related physical characteristics.



EXPERIENCING GENDER

Bigeye National Study 2021 | Gender: Beyond the Binary



Female



Western society has traditionally associated some personality traits more with masculinity and others with femininity. In his ground-breaking book, **Gender Advertisements**, first published in 1976,

Erving Goffman describes how femininity and masculinity are portrayed in Western media.⁶ Women are consistently portrayed as soft, vulnerable, fragile, powerless, dreamy, child-like, and submissive. In contrast, men are generally depicted as confident, comfortable, present, and aware of their surroundings. Goffman argues that these traits have nothing to do with biology or nature, but rather with how our culture defines feminine and masculine.

Forty-five years after the publication of Goffman's book, there is a growing body of evidence from neuroscientific studies and developmental psychology that finds notions of femininity and masculinity are culturally-defined, rather than intrinsic, biological traits. To assess how these traits are experienced by individuals, we asked survey respondents to place themselves on a series of spectrums.

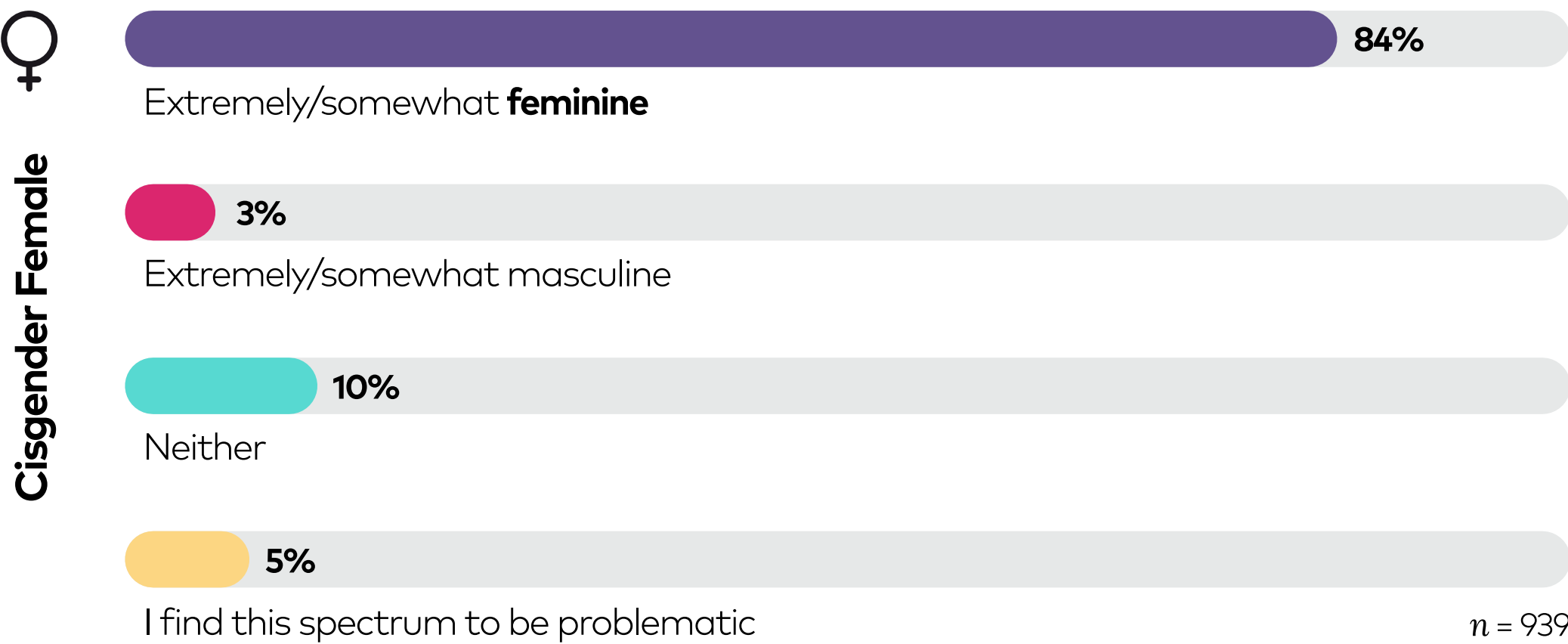
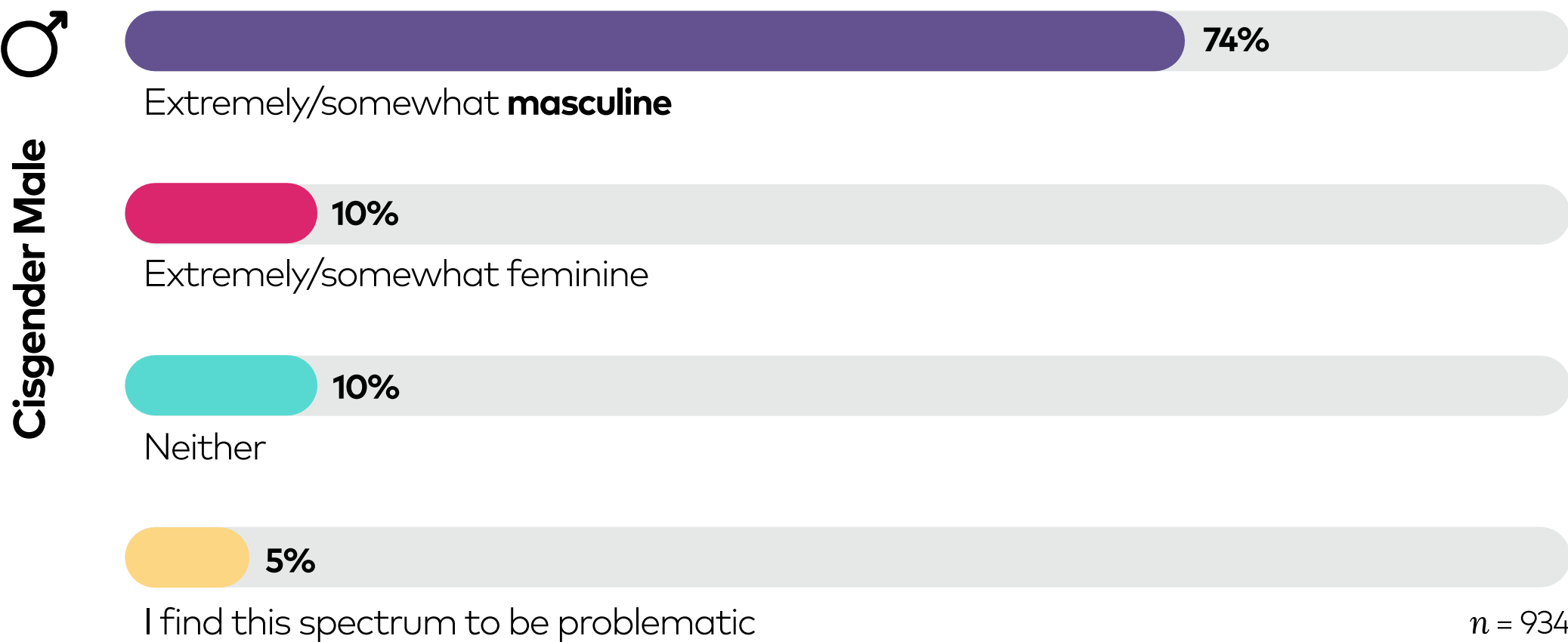
6. Erving Goffman, *Gender Advertisements* (Harper & Row, NY: Harper Colophon Books, 1976)

QUESTION 21

On a Spectrum from Feminine to Masculine, Where Do You Place Yourself?

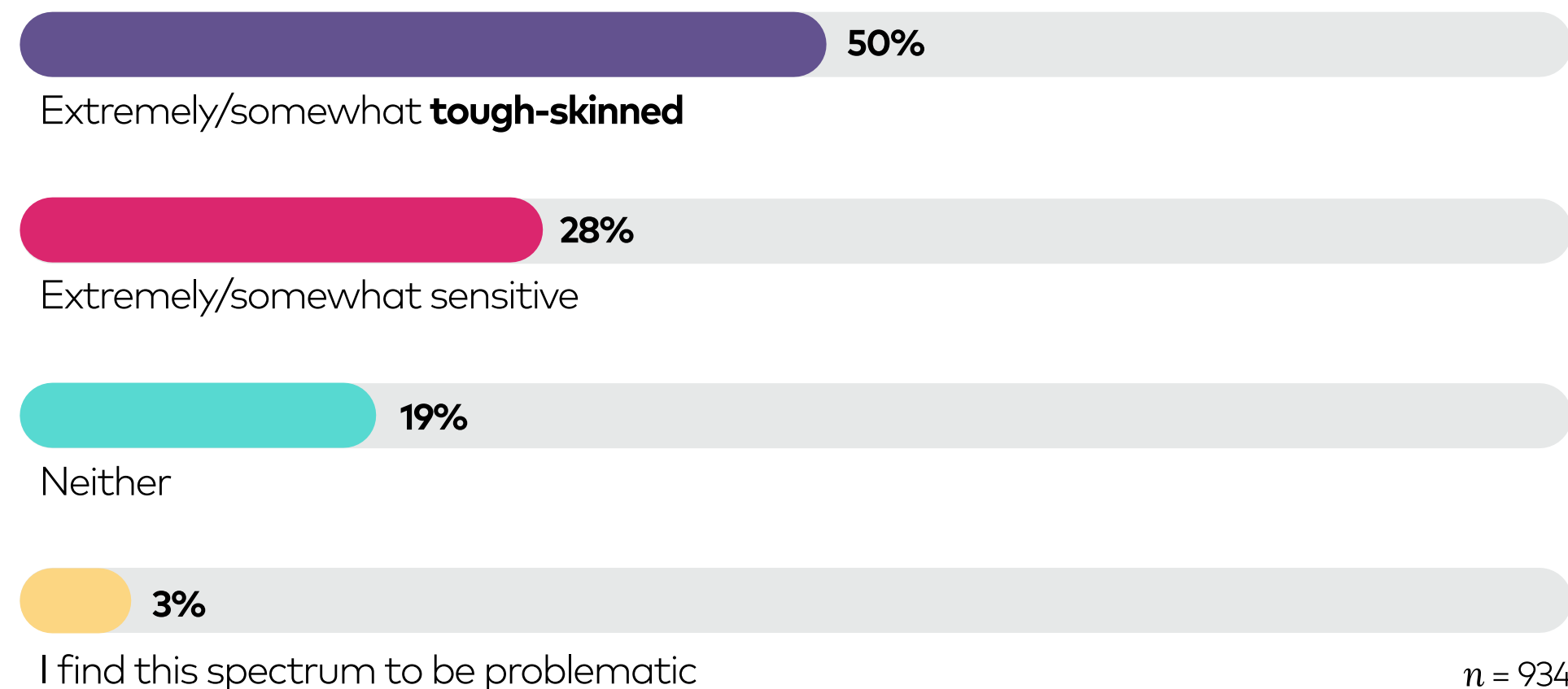
Eighty-four percent of cisgender female respondents consider themselves to be feminine compared to almost three-quarters of cisgender male respondents who consider themselves to be masculine. Ten percent of male respondents consider themselves feminine while about equal

percentages of male and female respondents don't feel one way or the other (10% and 9%, respectively). Five percent of each group don't relate to the spectrum and/or find it problematic.

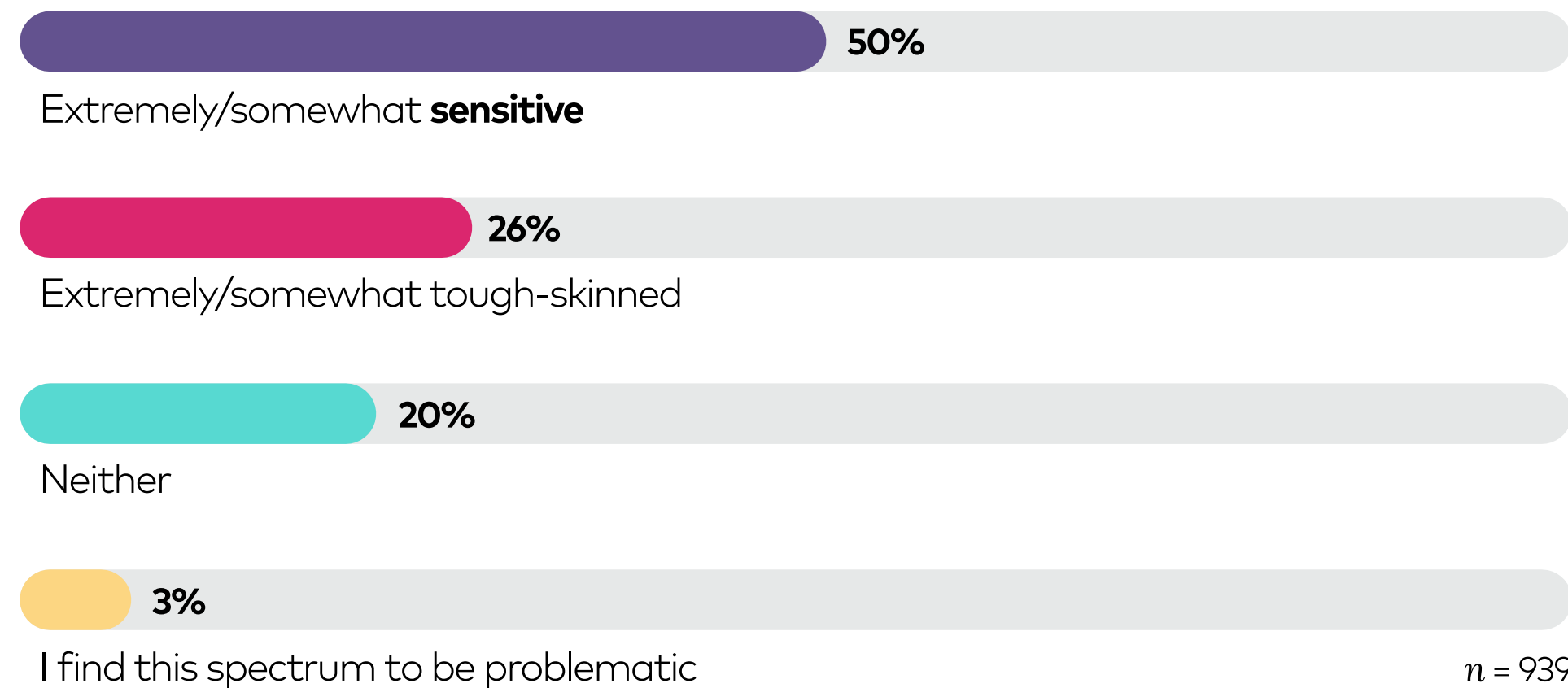




Cisgender Male



Cisgender Female



QUESTION 22

On a Spectrum from Sensitive to Tough-Skinned, Where Do You Place Yourself?

One of the most enduring stereotypes is that females are emotionally sensitive and males are emotionally resilient or tough-skinned. This resonates with around one-half of all respondents (50%), but more than one-quarter of cisgender

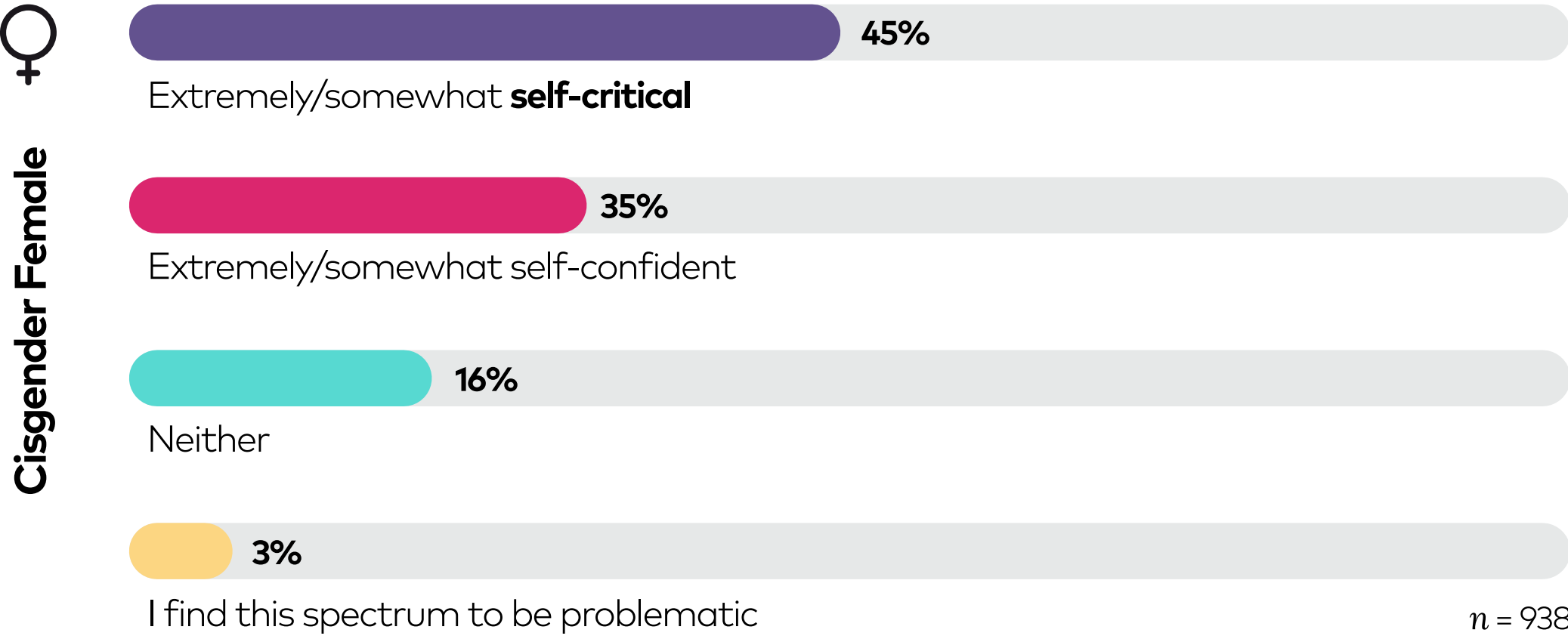
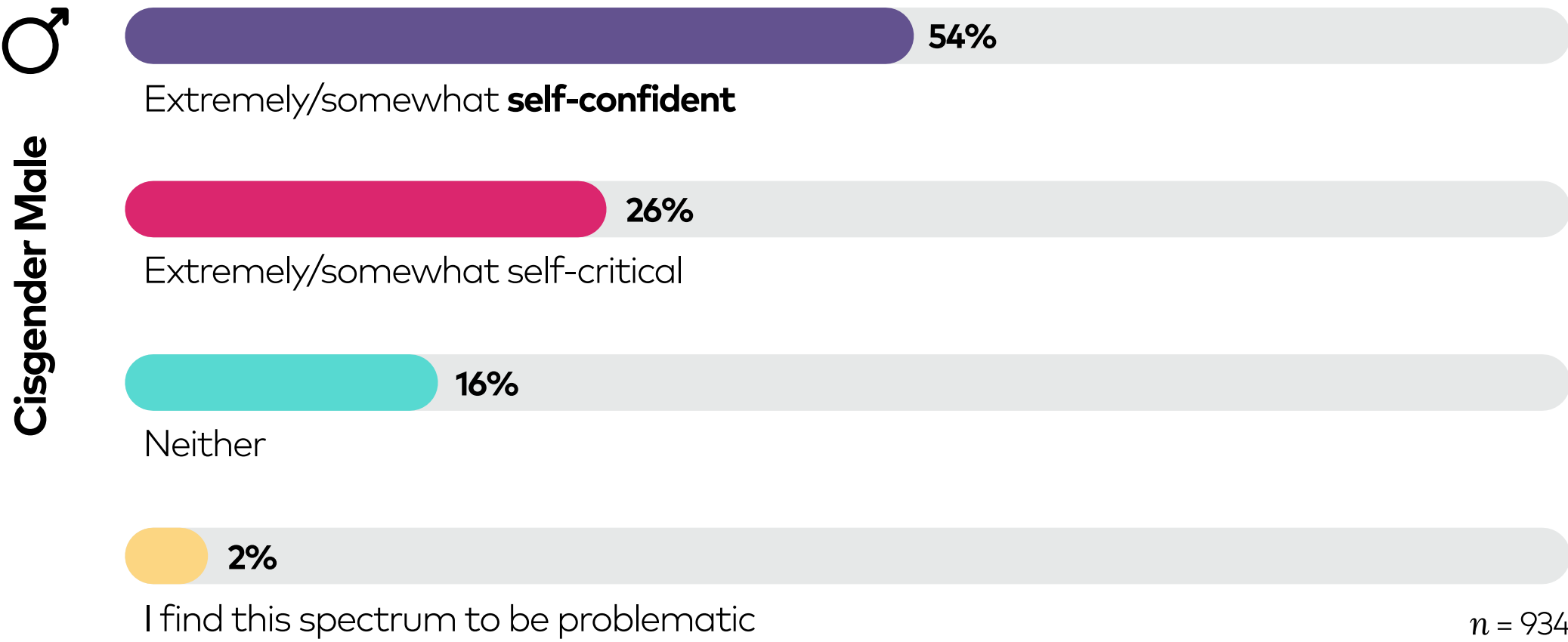
males (28%) and females (26%) place themselves on the "opposite" trait, and one-fifth select neither (20%). Three percent of each group don't relate to the spectrum or find it problematic.

QUESTION 23

On a Spectrum from Self-Critical to Self-Confident, Where Do You Place Yourself?

Another gender stereotype we wanted to investigate is the idea that males are naturally self-confident and that females are self-critical. Over one-half of cisgender male respondents place themselves on the "self-confident" zone of the spectrum (54%), but fewer than half of the

cisgender females identify as self-critical (45%). Over one-third of cisgender females identify themselves as self-confident (35%), compared to just over one-quarter of cisgender males (26%).

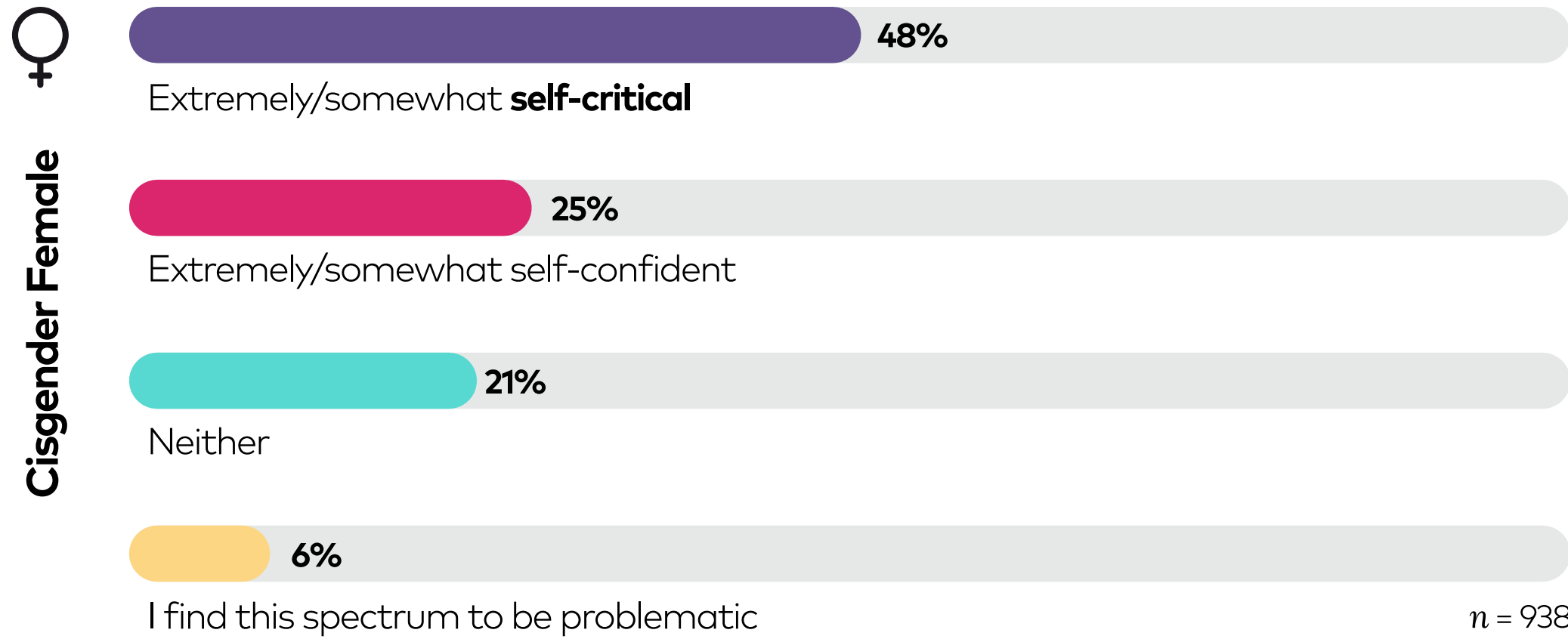
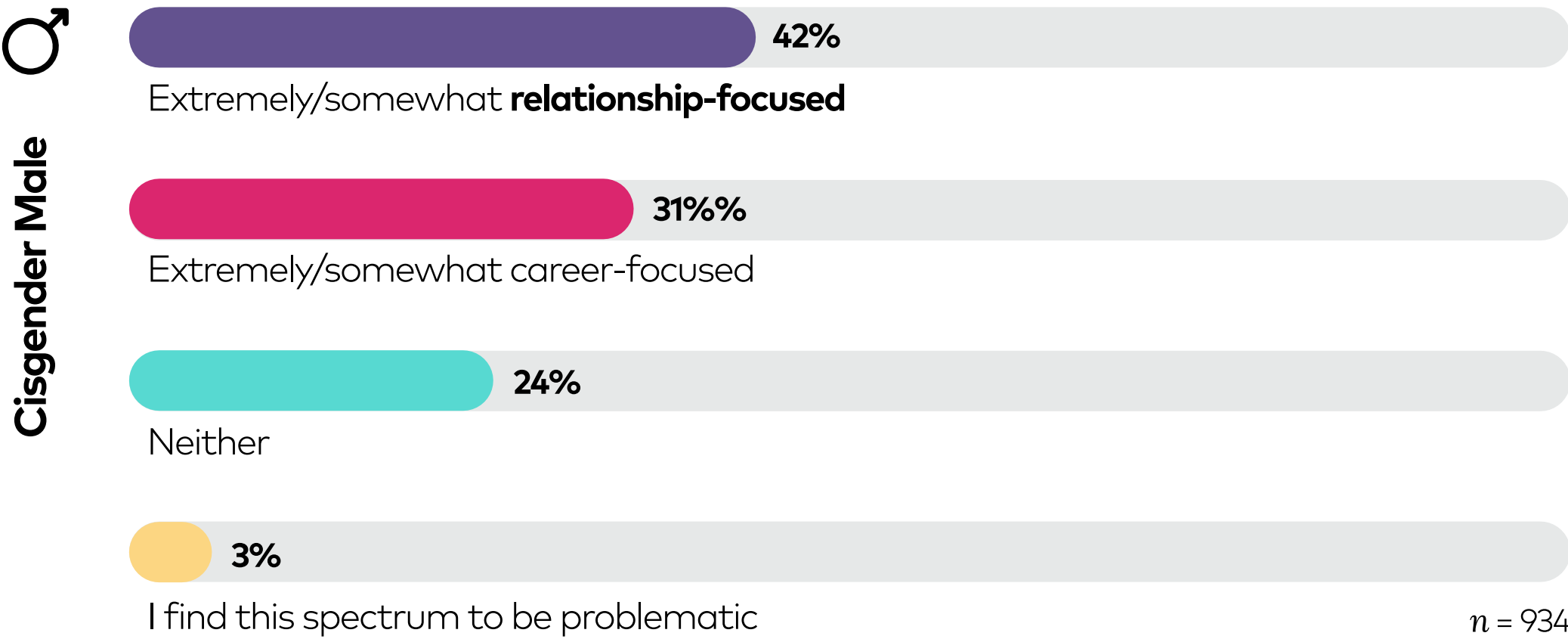


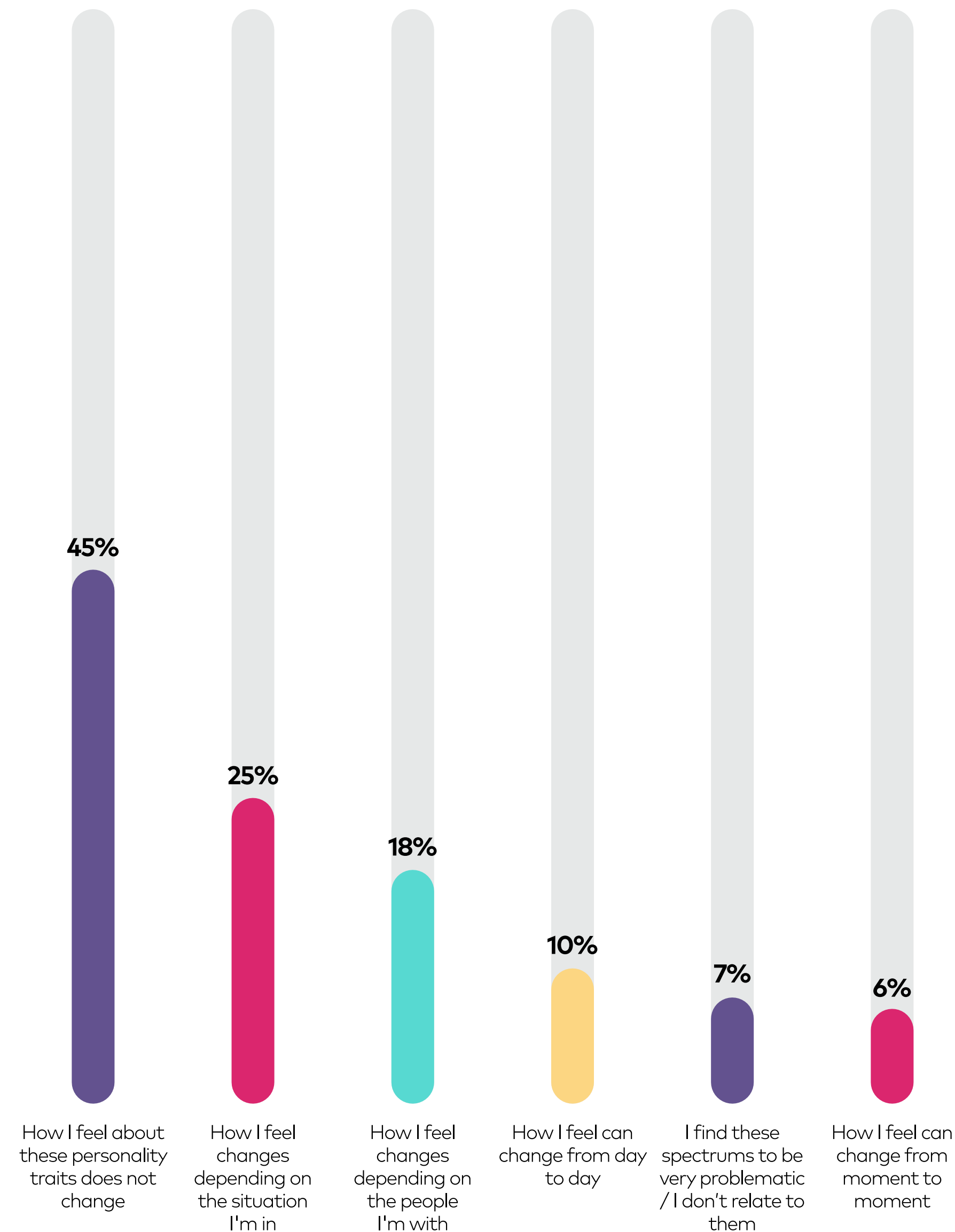
QUESTION 24

On a Spectrum from Relationship-Focused to Career-Focused, Where Do You Place Yourself?

Traditional portrayals of men as career-driven breadwinners and women as dutiful housewives focused on maintaining familial relationships do not reflect contemporary society where both partners are likely to be in the workforce - and more likely to share responsibility for maintaining their personal relationships. Under one-third of cisgender male respondents consider themselves career-focused (31%) compared with just over one-fifth of cisgender females (21%). The predominant response is relationship-focused for 42 percent of males and almost one-half of all females (48%).

Responses from cisgender respondents indicate that their experiences are not as consistent with stereotypical traits as we might have imagined. But do their experiences change over time? We asked respondents to reflect on their previous answers and to select one or more statements that they felt applied to them.





QUESTION 25

Thinking about Your Answers to the Previous Question, Does How You Feel about Each Trait Remain Consistent, or Does It Change?

Forty-eight percent of cisgender females indicate that how they feel about their personality traits does not change, while for cisgender males, the same is true for 46 percent. The most likely to experience traits consistently are respondents belonging to the Silent Generation, of whom over two-thirds say how they feel does not change (67%), compared to just over one-quarter of Generation Z (27%), and LGBTQIA+ respondents (also 27%).

One-quarter of cisgender respondents, both male and female, say that how they feel changes depending on the situation they're in (25%), and among LGBTQIA+ people, this is the top response (30%). The most likely are Generation Z, among whom over one-third do so (35%).

About equal numbers of respondents say that how they feel depends on the people that they are with (cisgender males 18%, females 17%), but one-quarter of Generation Y do so (25%), as do 29 percent of LGBTQIA+ respondents.

For around 10 percent of respondents, how they feel can change from day-to-day, but Generation Z is more likely to do so at 16 percent, and LGBTQIA+ respondents the most likely, with one-fifth selecting this answer (20%). Six percent of all respondents report feeling different from moment to moment compared to almost twice as many of those identifying as LGBTQIA+ (11%).

“When I’m with people I trust, I do tend to express myself more theatrically just for the fun of it. I will say that I have a distaste for the traditional association of gender with these traits. I’m a masculine person but I don’t think being less emotional, for example, is what makes me that way.”

RG, trans man, Gen Z, South

“I definitely think that my relationship to masculinity and femininity shifts in a number of different contexts. Mainly, it depends on who I’m around, how well they know me, and how well I perceive them to understand the subtleties of gender and sexuality. In professional settings, I often find myself having to lean towards femininity for the sake of presenting myself as a trans person and sort of having to represent my community through my expression.”

RG, nonbinary, Gen Z, Midwest

“Some hetero-normative women I have observed seem to want to be confrontational with me, and I don’t know if they think they are fighting someone like themselves or discriminating against me for being different, gender-wise. As someone with more than one gender expression happening at once, I feel like it is my job to be different from other people. A lot of people don’t understand or even seem mad at me for being different.”

FM, genderfluid, Gen Y, Northeast

“I respond differently depending on context. Who I am with, the situation that is happening, and how mentally well I am doing then. I identify as agender so I have never seen myself as connected to a gender. These traits as mentioned above don’t have a relation to my gender identity because I don’t see what I do or who I am in a gendered lens.”

AS, agender, Gen Z, West



What's in a Name?

In our qualitative study with nonbinary and genderfluid individuals, **7 out of 10 participants had changed the name** given to them at birth to one that they feel better reflects their gender identity.

For transgender and nonbinary individuals, changing their name from one given at birth is an important rite of passage - yet often an administrative nightmare as changes of name have to be reflected on driver's licenses, social security cards, birth certificates, and credit cards.

In 2020, MasterCard's TrueName™ campaign announced that trans customers could use their preferred name on credit cards, and United Airlines began offering passengers

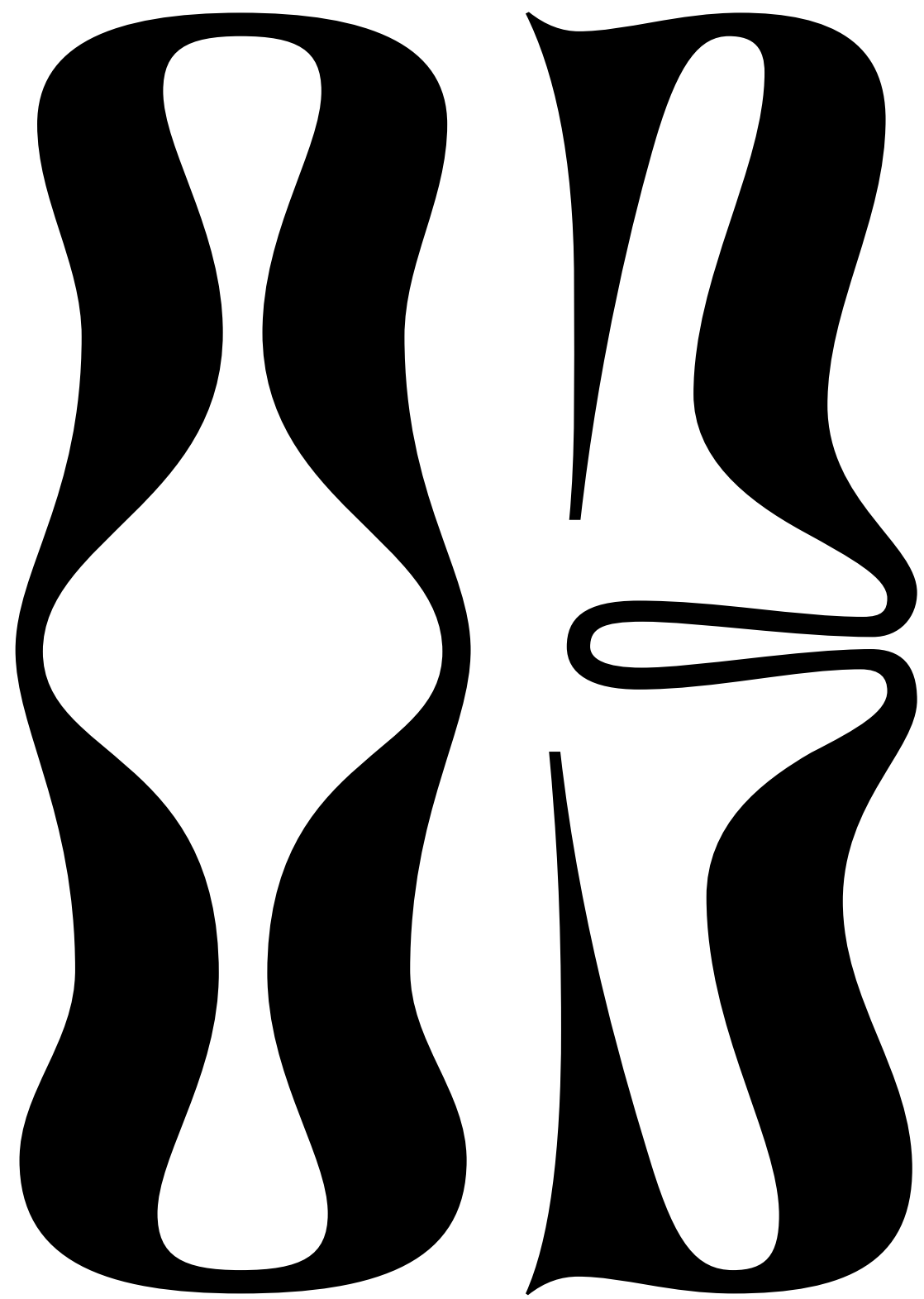
nonbinary booking options. Twelve states have introduced gender-neutral IDs and provide an "X" alternative to "M" and "F" on driver's licenses.

The importance of these policies is deeply personal: being able to use their chosen names and gender markers sanctions transgender and nonbinary gender identities. Starbucks in the UK captured this perfectly in its award-winning TV spot called "Every name's a story" depicting a trans man using his chosen name for the first time.

Watch: TrueName spot at <https://www.youtube.com/watch?v=hipQcun4ArQ>

Watch: Starbucks spot at <https://www.youtube.com/watch?v=pcSP1r9eCWw>

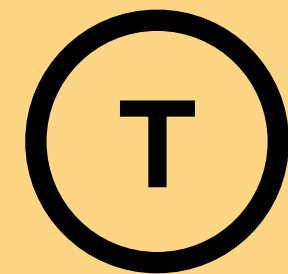




DEPICTING GENDER

Bigeye National Study 2021 | Gender: Beyond the Binary





he previous section introduced Canadian-born American sociologist, social psychologist, and writer Erving Goffman. In **Gender Advertisements'** analysis of models' poses, positioning of the body, clothing, and use of props, Goffman finds stark contrasts between how males and females are portrayed in the advertising of the 1970s. But how different are depictions of gender today? To find out, we asked respondents to indicate their level of agreement or disagreement with a series of statements.

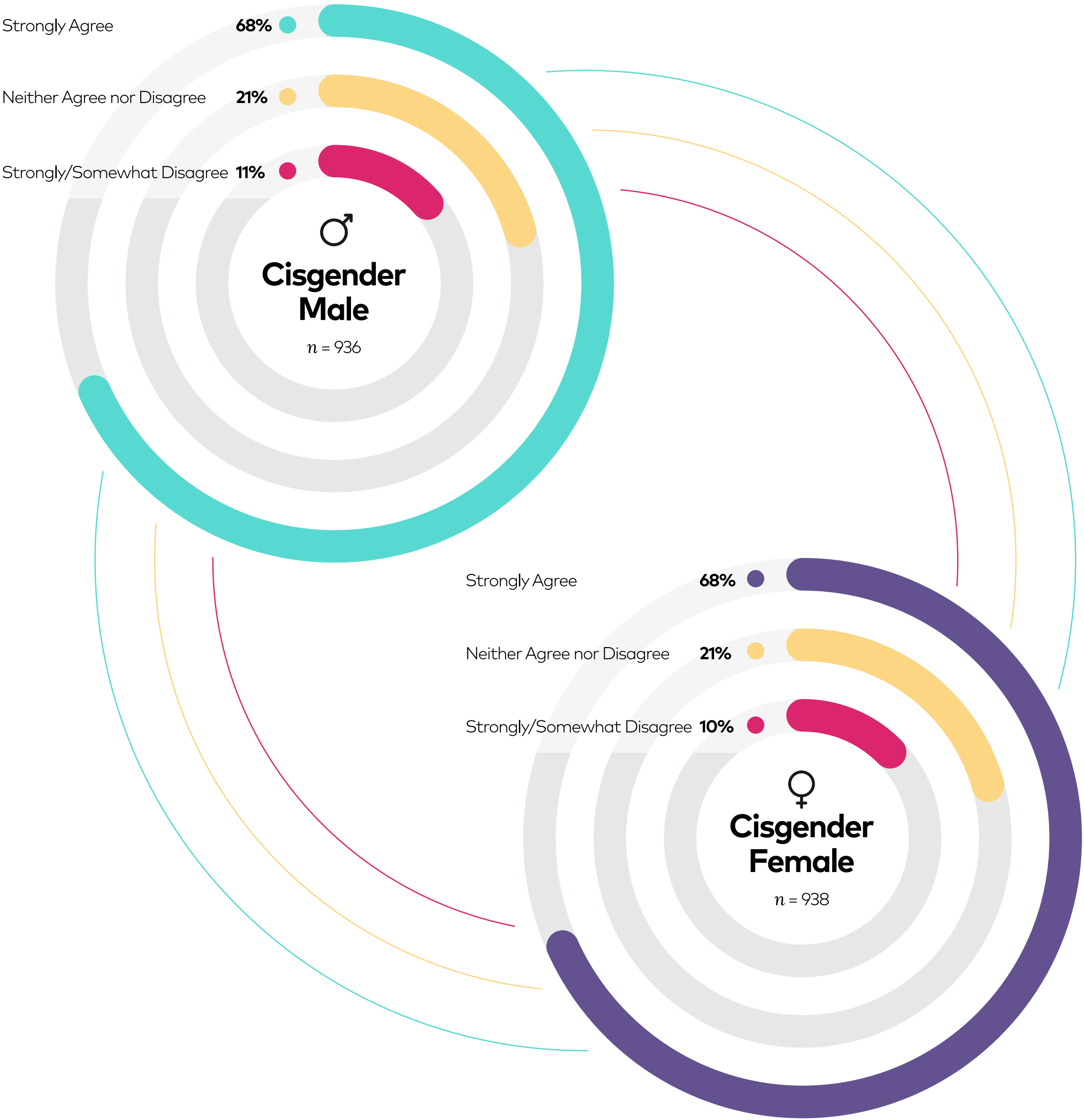


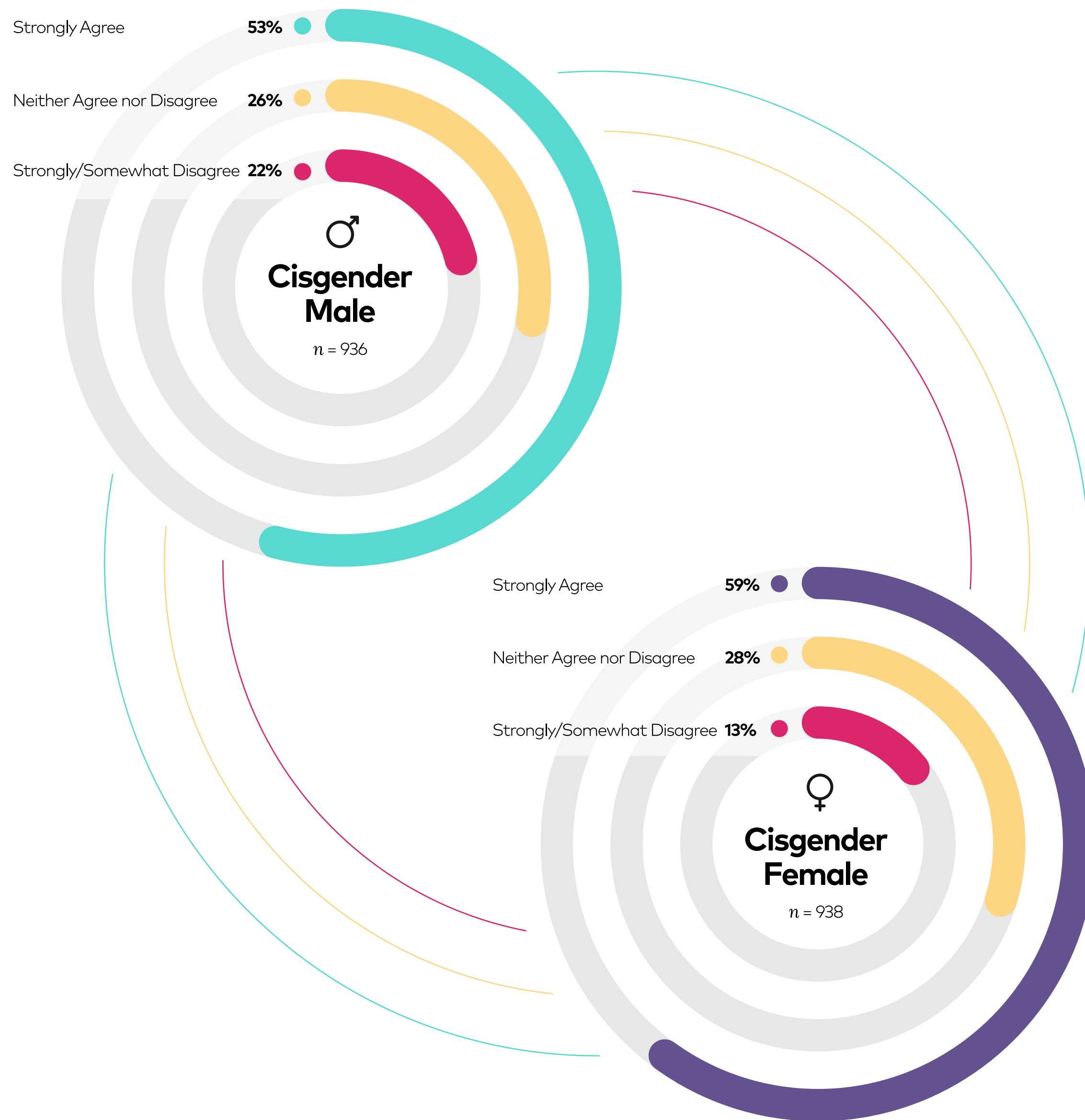
QUESTION 28

Advertisements and Commercials Often Keep Men and Women in Traditional Gender Roles

Over two-thirds of cisgender respondents agree with the statement that media depictions of men and women often keep them in traditional roles (68%), while among LGBTQIA+ respondents, almost three-quarters agree (74%). Least likely to agree are cisgender males of Generation Z at 57 percent, in contrast with over three-quarters of

Generation Y cisgender males (77%) and the Silent Generation (76%). Respondents in the Northeast were ten points more likely to agree (73%) than those in the South (63%).





QUESTION 29

Advertisements and Commercials Can Change How We Perceive Traditional Gender Roles

Cisgender females are 6 points more likely to agree that ads can change perceptions (59%) than males (53%) but over one-quarter of each group are neutral. Over one-fifth of cisgender males disagree (22%), compared with 13 percent of females. Among LGBTQIA+ respondents, almost three-quarters agree (74%) and only 10 percent disagree. Almost two-thirds of Gen Y cisgender male respondents agree (65%), but older generations are much less likely to do so. While 60 percent of Boomer females agree, only 43 percent of males of that generation do so - and almost

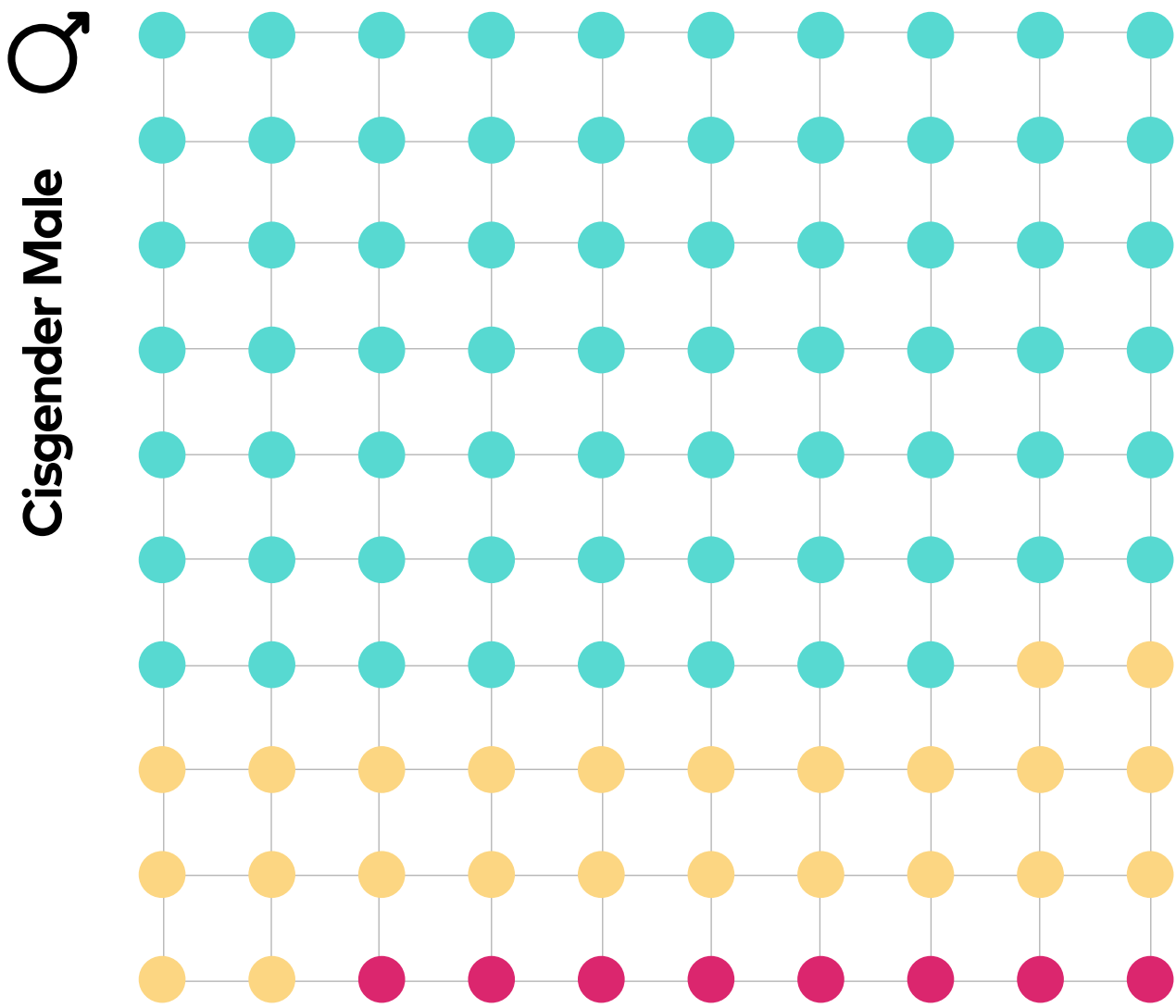
one-third disagree (32%) - indicating perhaps that they are the most skeptical of ads' ability to change perceptions. Agreement is weakest of all among the oldest respondents with 44 percent of Silent Generation cisgender females and 41 percent of males agreeing; 29 percent of this cohort disagree.

QUESTION 30

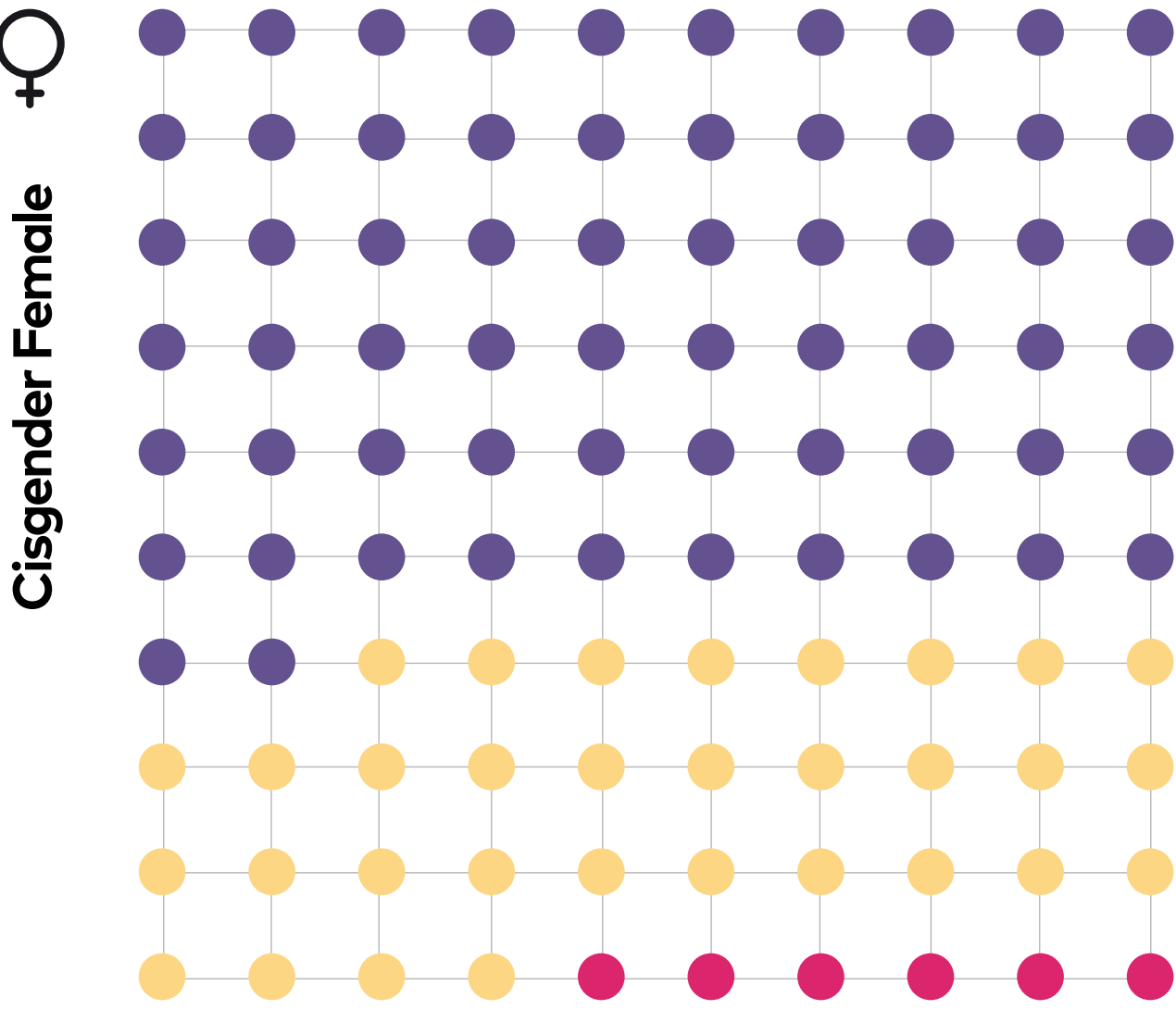
I’m Seeing More Men Portrayed Positively as Active, Involved Fathers in Advertisements and Commercials These Days

Overall, cisgender females are four percentage points more likely to agree with the statement, but when we analyze just the responses from parents with children under the age of 17 in their household, that difference is reversed. Almost four-fifths of cisgender male parents agree (79%) compared with three-quarters of female parents (75%). Respondents with children in their households (n=551) are likely to be more sensitive to depictions

of family life and gender roles in a parenting context. Although a small sample size, among LGBTQIA+ parents, male respondents are about as likely to agree (73%) as females (74%).



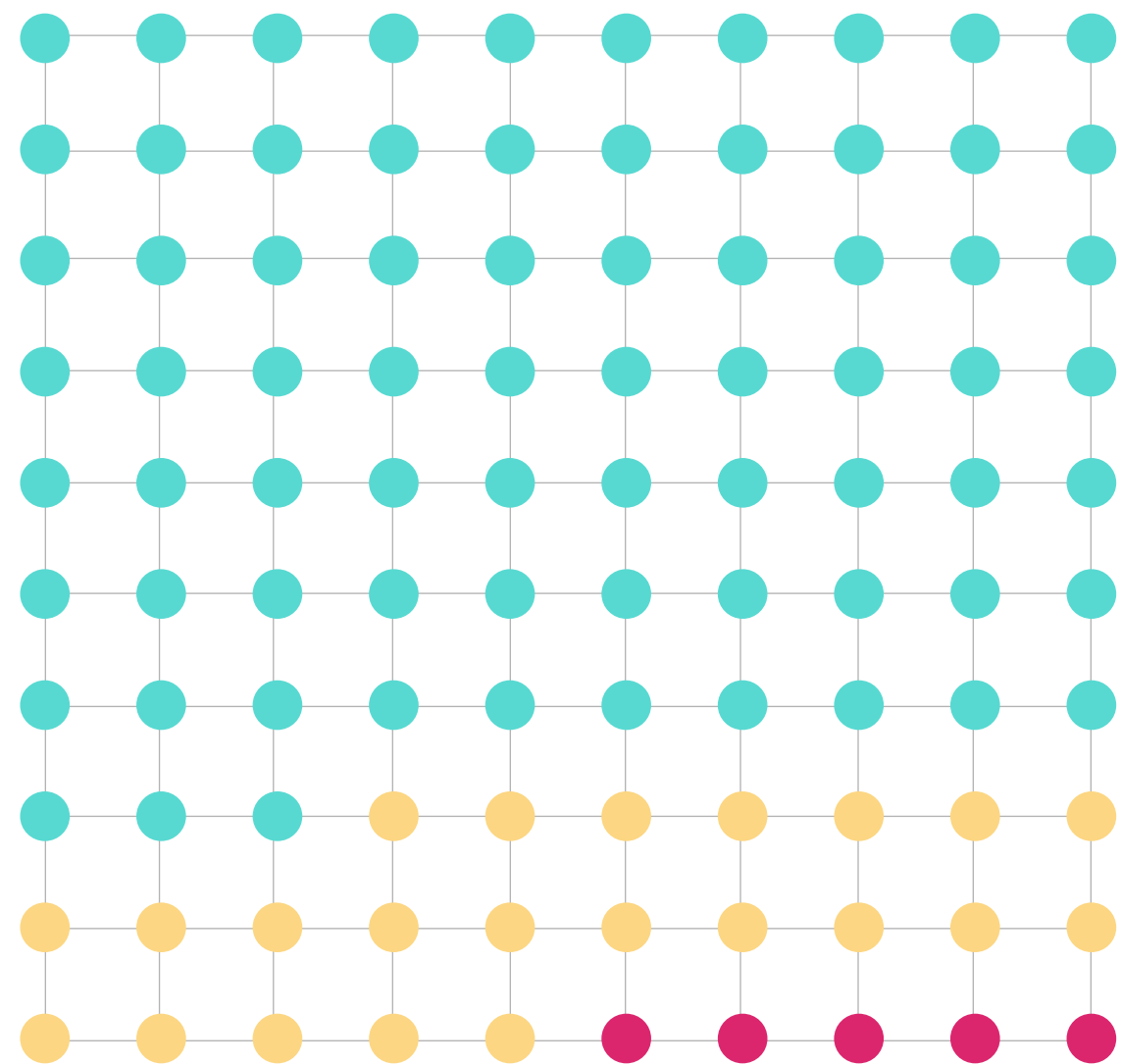
n = 936



n = 938



Cisgender Male

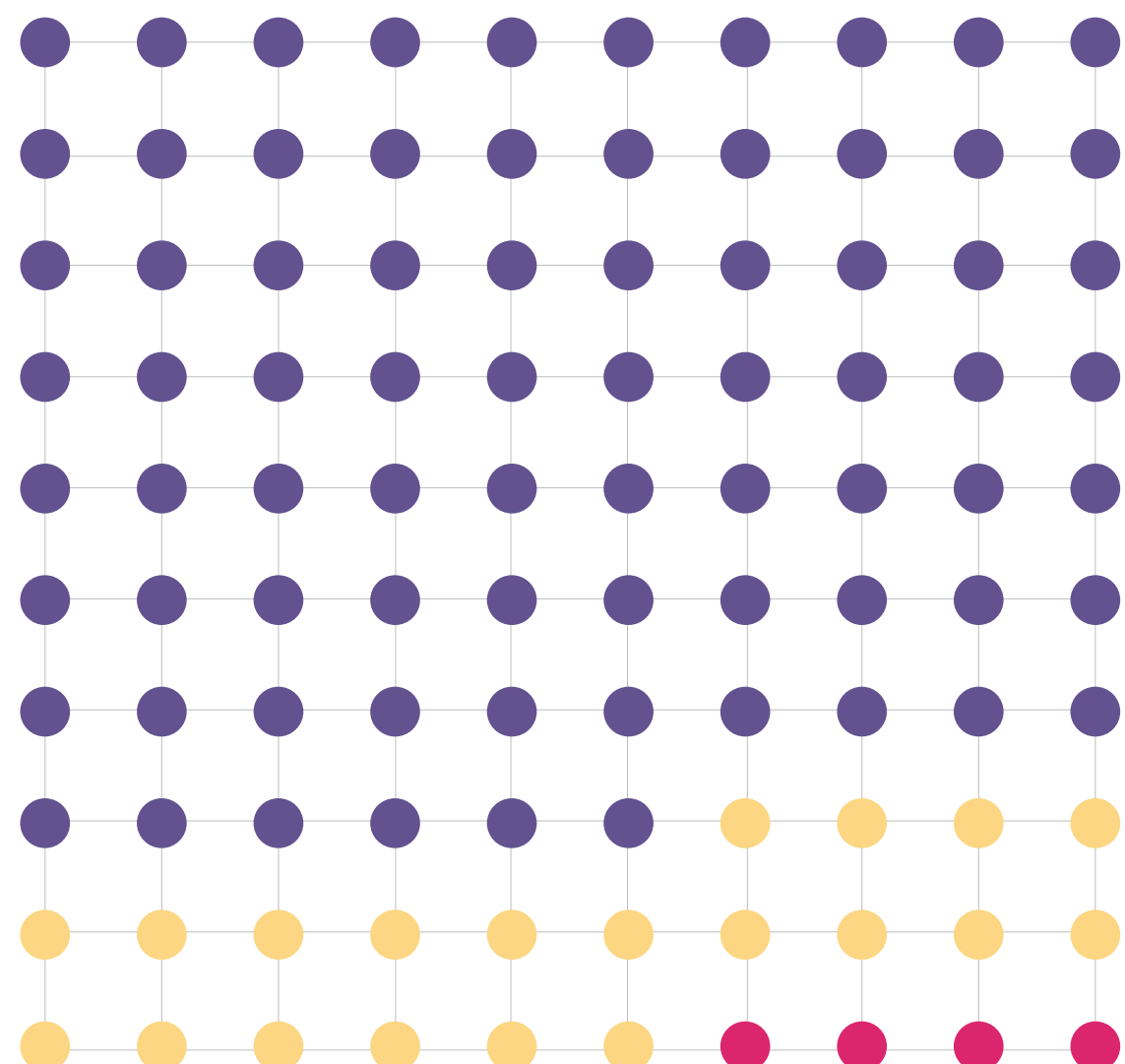


n = 936

Strongly/somewhat agree	73%
Neither agree nor disagree	22%
Strongly/somewhat disagree	5%



Cisgender Female



n = 938

Strongly/somewhat agree	76%
Neither agree nor disagree	20%
Strongly/somewhat disagree	4%

QUESTION 31

I'm Seeing More Women Portrayed Positively in Business Leadership Roles and Occupations Traditionally Associated with Men in Advertisements and Commercials These Days

Close to three-quarters of cisgender male respondents say they are seeing more positive portrayals of women in business (73%), while for females, the percentage is three points higher (76%). More than three-quarters of all respondents in the Northeast agree (76%) - 6 points more than those in the South.



Research Shows Women Are Better Leaders During a Crisis

The **Harvard Business Review** reported that in an analysis of 360-degree assessments conducted during the COVID-19 pandemic in 2020, women were rated by those who work with them as more effective leaders. In the midst of a crisis, women were rated more positively on 13 of the 19 competencies that comprise overall leadership effectiveness.⁷

QUESTION 32

I Feel Well Represented in the Advertising and Commercials I See

Over one-half of cisgender respondents feel well represented in advertising, with just three percentage points separating cisgender male respondents (56%) from females (53%). However, looking at responses from different ethnic and racial identities, a different picture emerges.

Among Asian and Pacific Islanders, over one-half of cisgender males feel well represented (52%), compared to just over one-third of females (34%). One-half of Black or African American cisgender males feel well represented (50%), compared to 44 percent of females. A perception gap exists between Hispanic or Latino cisgender males and females: Over two-thirds of males feel well represented (68%), in contrast to less than one-half of females (46%). While too small a sample to be statistically significant, the results suggest

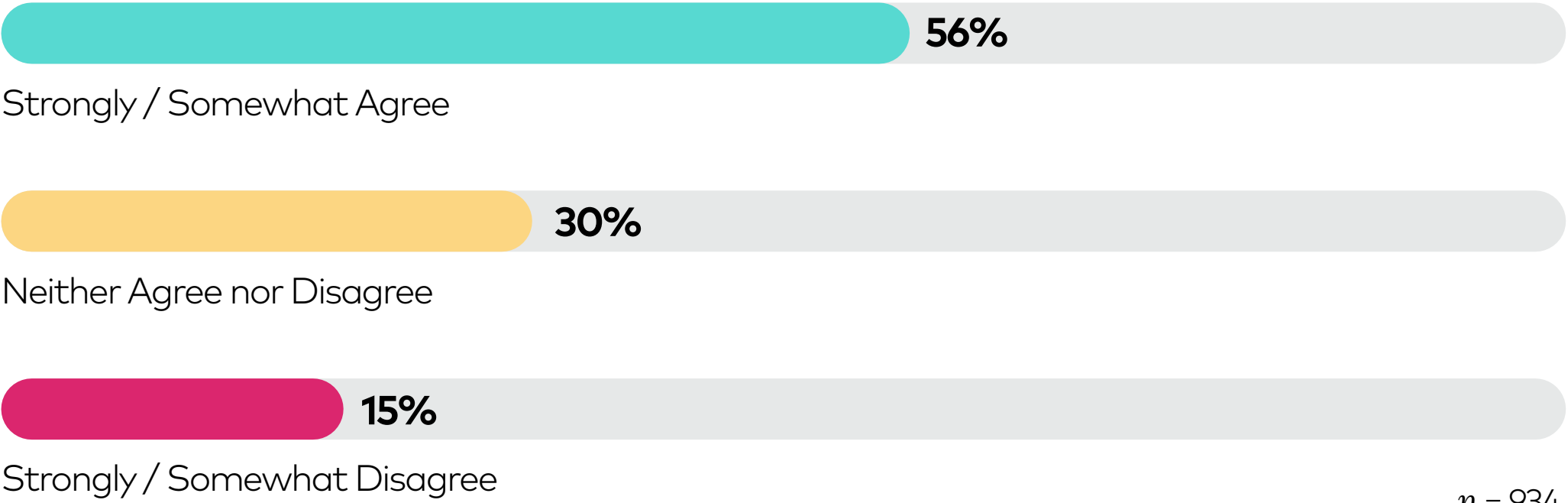
that Native American or Alaskan Natives cisgender males and females also have very different perceptions: 60 percent of males agree, while a little over half as many females do so (36%).

Less than one-half of LGBTQIA+ respondents feel well represented (45%) and almost one-quarter disagree (23%). Only Asian Pacific Islander cisgender females disagree more at 26 percent, making them the group most likely to feel poorly or underrepresented.

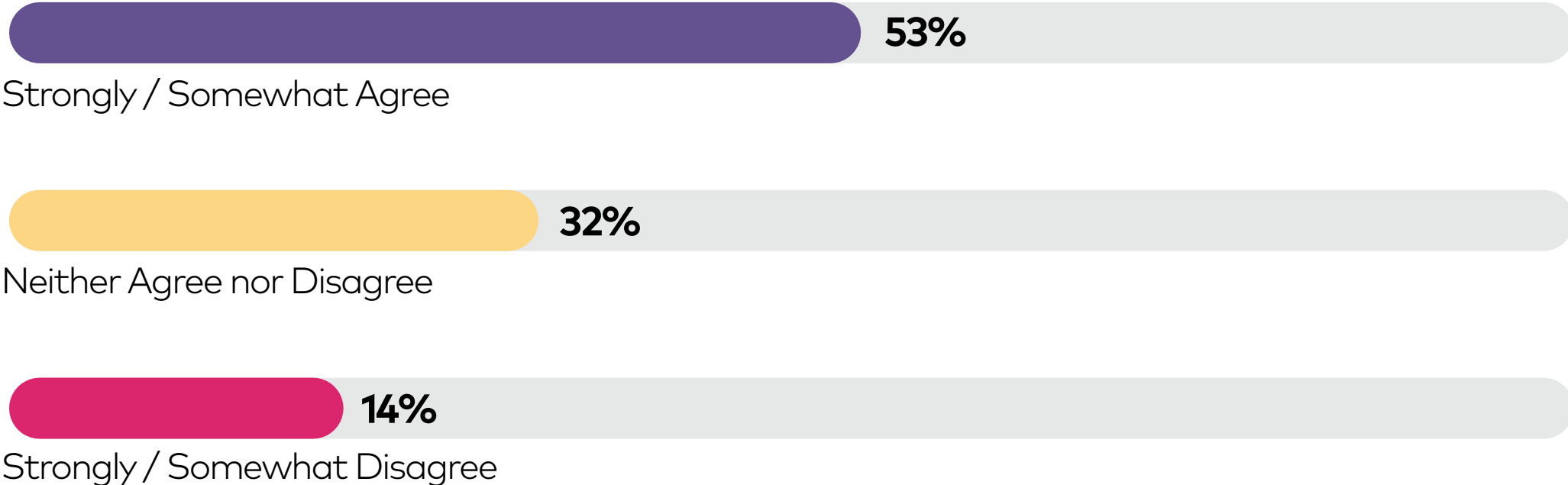
It's worth noting too that with close to one-third of all respondents being neutral (31%) and 15 percent overall disagreeing, for advertisers and their agencies there is plenty of room for improvement in the depiction of gender roles that authentically reflect contemporary consumers' lived experiences.

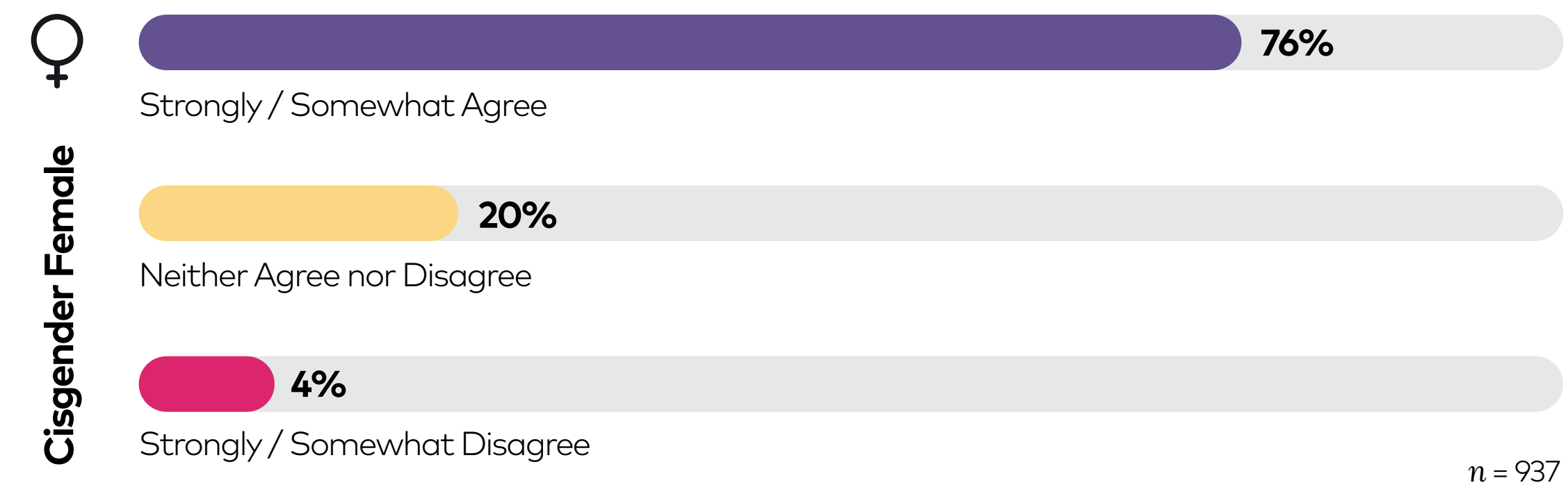
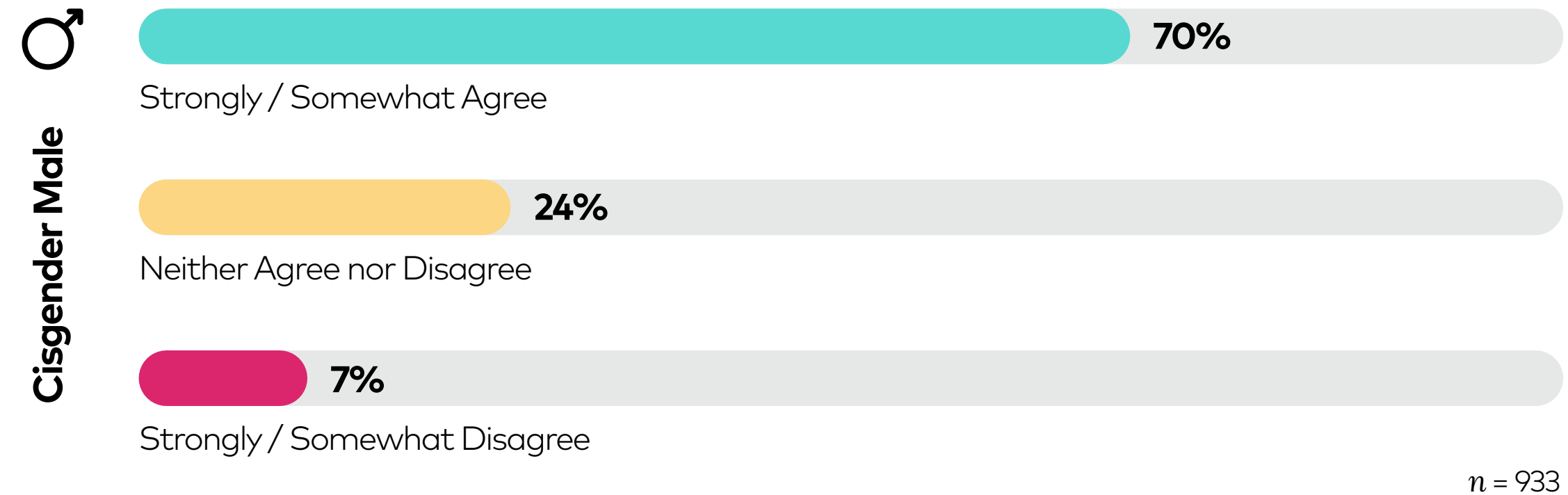


Cisgender Male



Cisgender Female





QUESTION 33

I Prefer Advertising and Commercials That Show Men and Women Can Have the Same Capabilities and Roles

Overall, approaching two-thirds of respondents agree (72%). Reflecting a reverse of the gender gap observable in respondents' answers to Q31, over three-quarters of cisgender females say they want to see ads that show that men and women

can have the same capabilities and roles (76%) - and the exact same percentage of LGBTQIA+ respondents agree. The generational cohort most likely to agree is Gen Y at 80 percent.

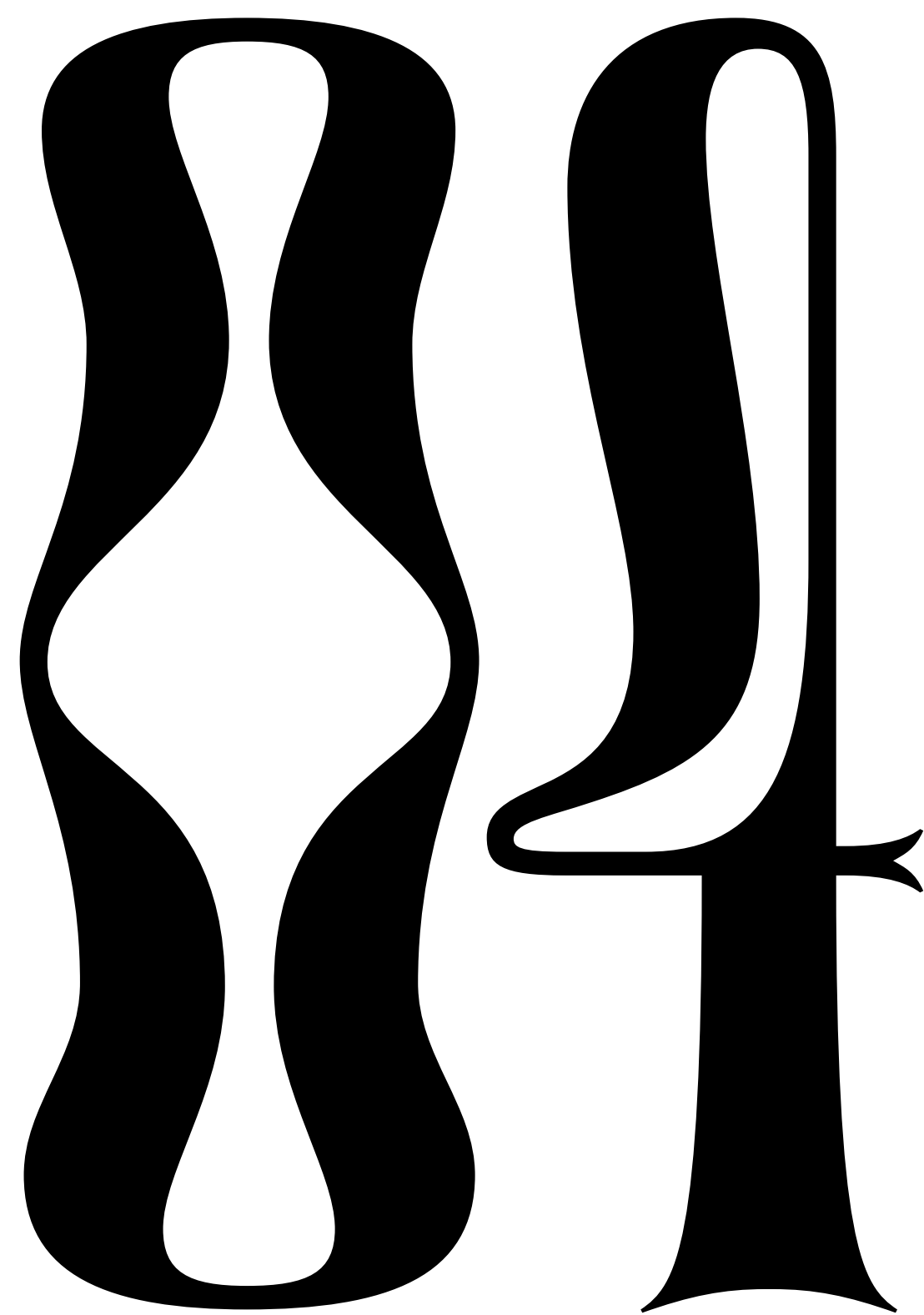
Gen Z	Gen Y	Gen X	Boomer	Silent Generation
67%	80%	70%	69%	74%
Strongly / somewhat agree n = 418	Strongly / somewhat agree n = 469	Strongly / somewhat agree n = 429	Strongly / somewhat agree n = 486	Strongly / somewhat agree n = 161

A woman with her hair in a ponytail, wearing safety glasses and a dark jacket, is working on a motorcycle engine in a workshop. She is focused on her task, and the scene is dimly lit with some light coming from a window in the background. The image has a teal and purple color overlay.

The Problem Is Not Seeing The Problem

The **Unstereotype Alliance** is a thought and action platform that seeks to eradicate harmful stereotypes in media and advertising content and contribute to empowering people in all their diversity - gender, race, class, age, ability, ethnicity, religion, sexuality, language, and education. Built around the notion that "the problem is not seeing the problem", the Alliance's campaign challenges advertisers to take a deeper look to recognize the problem of gender-based role stereotypes as a first step to eliminating them.

Watch: <https://youtu.be/ngtO-efwLlw>



GENDER AND CHILDREN

Bigeye National Study 2021 | Gender: Beyond the Binary



1960S



2012

In her 2014 book, **Parenting Beyond Pink & Blue**, child developmental psychologist Christia Spears Brown cites decades of in-classroom research that illustrates how similar boys and girls really are.⁸ Spears Brown asserts that our collective social dependence on gender stereotypes limits kids' ability to develop into unique individuals. She illustrates this point with studies that show parents engage less with boys, teaching them too that "boys don't cry". The fact that so many males grow up being out of touch with their emotions leads them to be more susceptible to suicide in young adulthood. Similarly, parents are less likely to use numbers or counting exercises when speaking to girls, leading them to believe they can't excel in math and the other STEM subjects.

Stereotypes perpetuate gender inequality, which leads to real-world problems for adults and children. Unequal outcomes might affect different people in a variety of practical, social, emotional, and economic ways - such as levels of professional attainment and personal development.⁹

In recent years, we have started to see a trend toward gender-free play options for children. Hasbro offered a gender-neutral Easy Bake Oven for the first time in 2012 - the same toy beloved of previous generations, but in a black and silver colorway. And, responding to pressure from parents about unnecessary gender-based signs, retailer Target announced in 2015 that it would ditch gender labels on toys. A UK-based campaign, "Let Toys Be Toys" petitions retailers to "please sort toys by theme or function, rather than by gender, and let the children decide which toys they enjoy best."⁹

8. Christia Spears Brown, *Parenting Beyond Pink & Blue* (Random House, NY: Ten Speed Press, 2014)

9. Let Toys Be Toys. "Let Toys Be Toys." Accessed September 14, 2020. <http://lettoysbetoys.org.uk/>

“I really just liked various toys and played with whatever interested me, e.g., Barbies, G.I. Joes, and Mattel cars. Barbie often married a G.I. Joe because they seemed much more practical than Ken. I definitely would have liked dolls in different ethnicities, as that was my most common gripe.”

BM, nonbinary, Gen Y, Midwest

“I had two brothers and played with their toys a lot but everyone kept trying to give me more ‘girl’ toys and when I asked my mom about it I clearly remember she said, ‘Those toys are for boys you need to play with dolls.’ I was confused because I thought ‘boy’ toys were more fun.”

AS, genderqueer, Gen Y, Northeast

“As early as age four or five, I can recall being more drawn to feminine things; I preferred to play with Barbie dolls, in fact, I often imagined myself as Barbie. I wanted to wear pink clothes instead of blue. I often sought to play jump rope with my female friends instead of football or basketball with the boys.”

CT, nonbinary, Gen Y, Northeast

“I only had two dolls I ever liked. The first was was a Dapper Dan/Dressy Bessy two-in-one doll, where one side was Dressy Bessy and the other was Dapper Dan (!) - and a three-in-one Little Red Riding Hood doll that flipped from being the girl, the grandma, and the wolf.”

EW, genderqueer, Gen Y, South

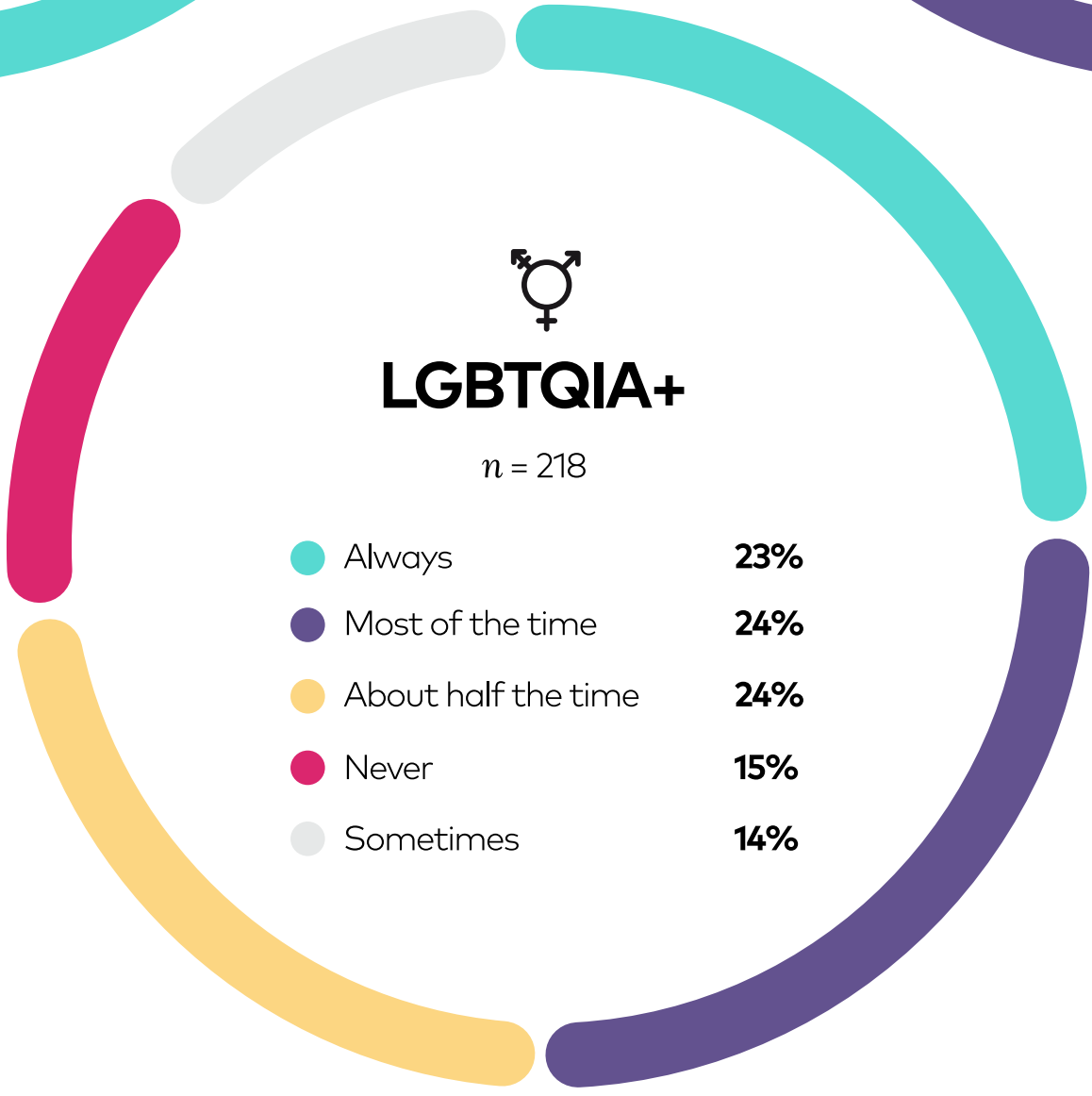
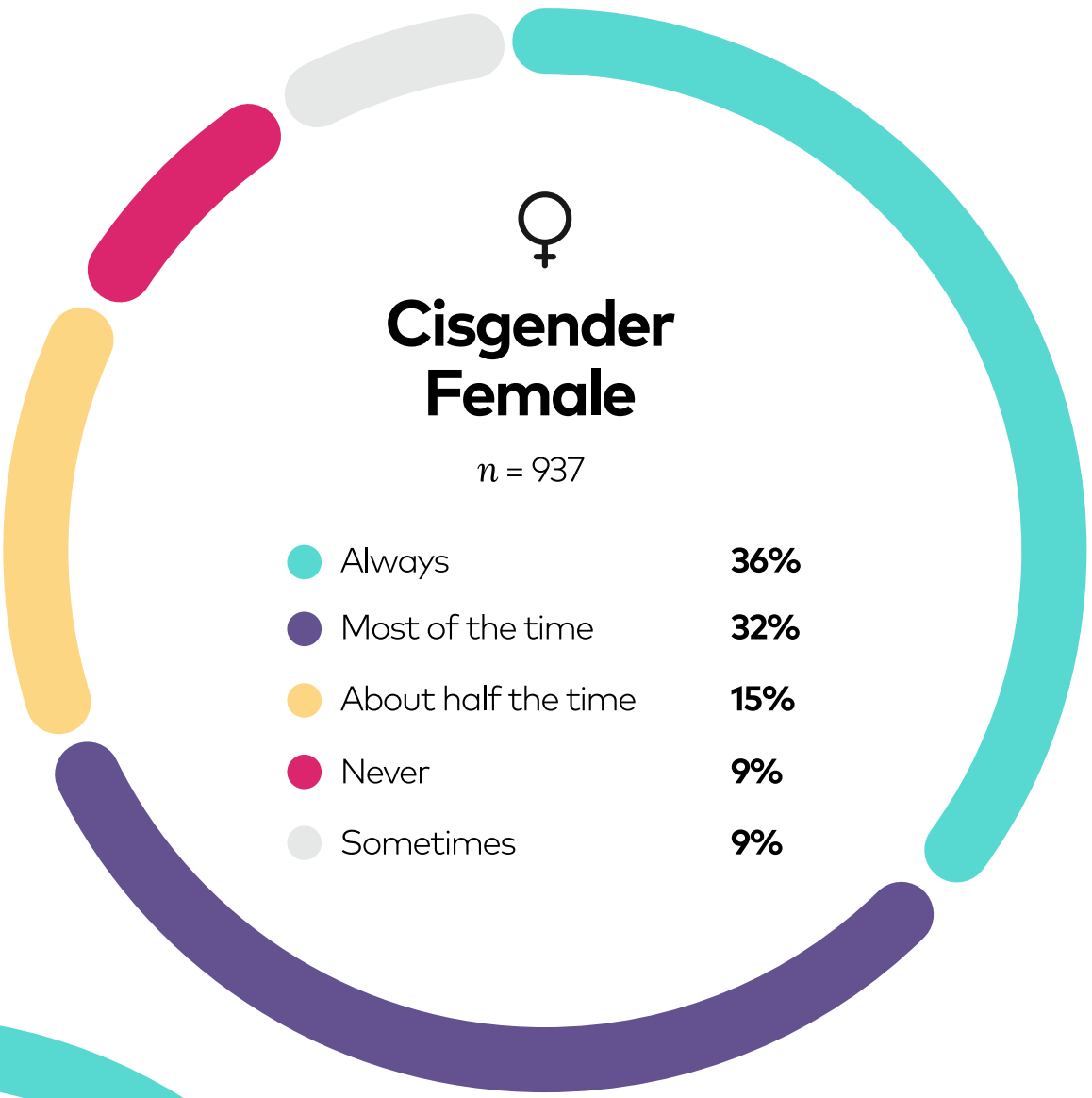
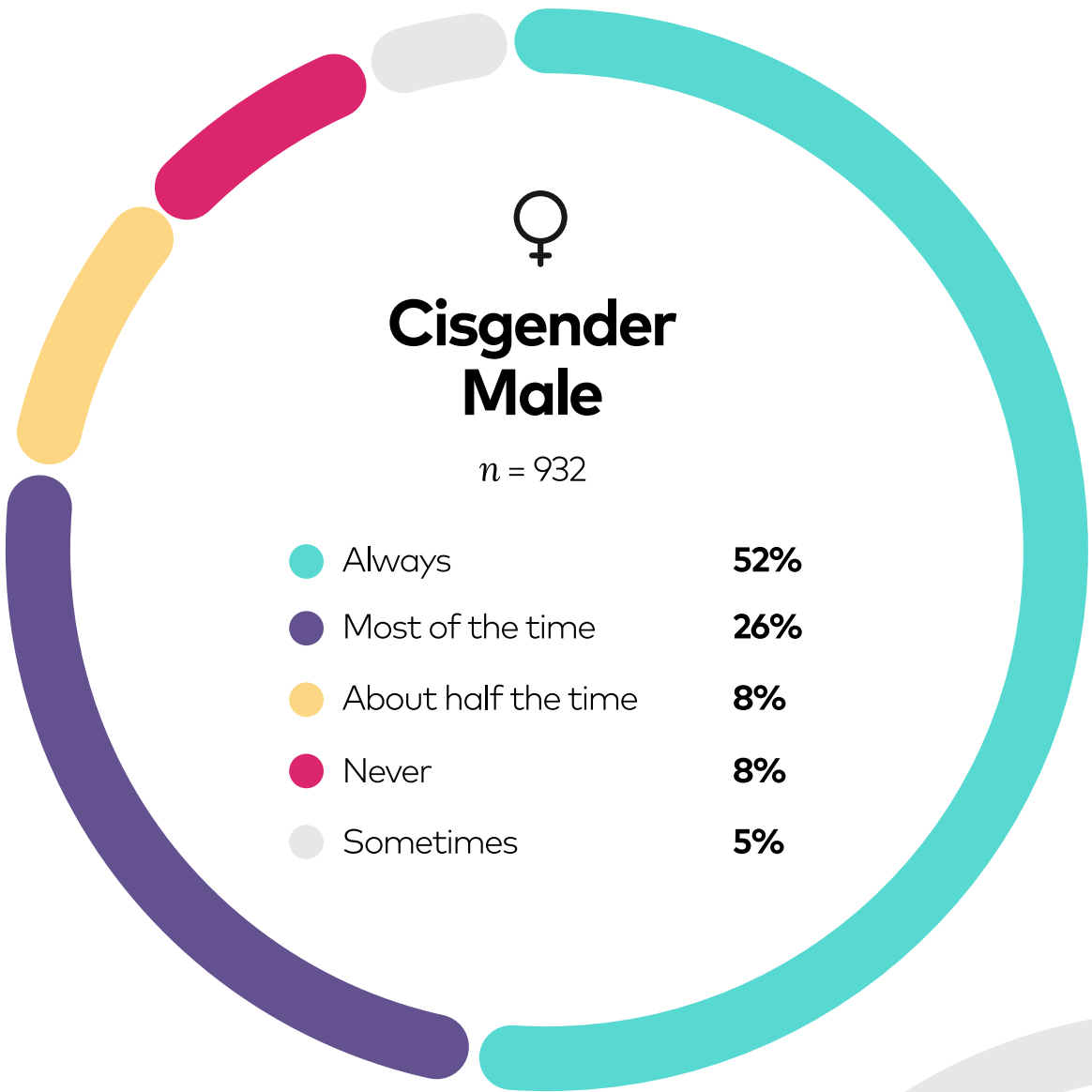
QUESTION 35

As a Child, Did You Identify with Gendered Toys Designed for the Sex You Were Assigned at Birth?

We asked all survey respondents a series of questions about the toys they played with as children, and posed some questions just for parents to learn if their experiences shape how they select toys and games for their own children.

While close to fourth-fifths of cisgender male respondents always identified with toys designed for boys or did so most of the time (78%), cisgender females were ten points less likely to do so with toys designed for girls (68%). Nine percent of cisgender females and 8 percent of males

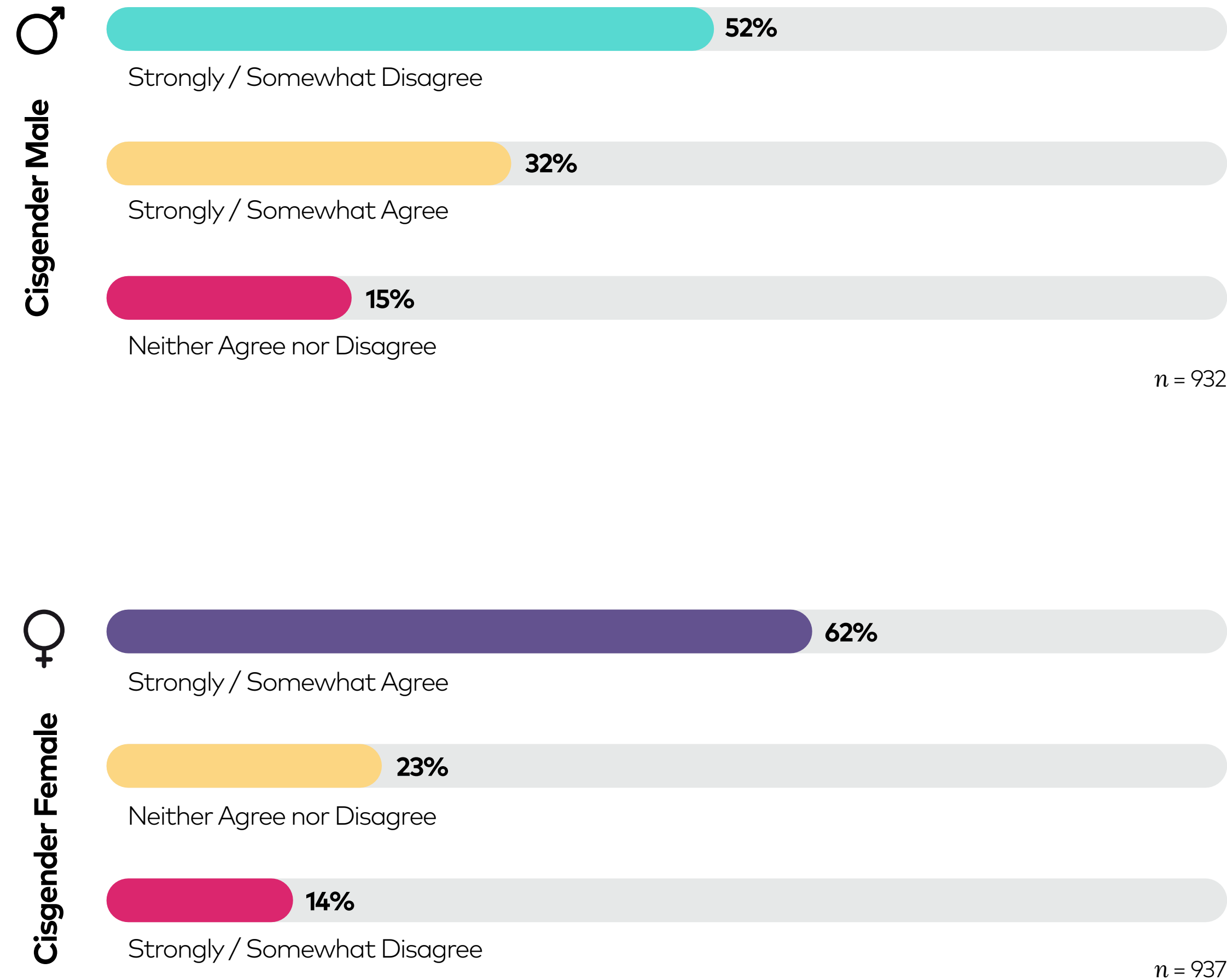
say they never identified with these toys. Among LGBTQIA+ respondents, fewer than one-half identified always or most of the time (47%), but were about as likely to never identify with them as other respondents, at 8 percent. Although a small sample, respondents who identify as Native American are less likely than other racial and ethnic identities to identify with toys at just 35 percent. One-fifth of respondents identifying as Black or African American say they never identified with toys designed for the sex they were assigned at birth (20%).



QUESTION 36

Growing up, My Parents/Guardians Encouraged Me to Play with Toys That Are Traditionally Associated with Girls and Related to Nurturing Roles or Their Appearance - Such as Baby Dolls, Barbie Dolls and Accessories, Ballerina Costumes, Makeup, and Jewelry.

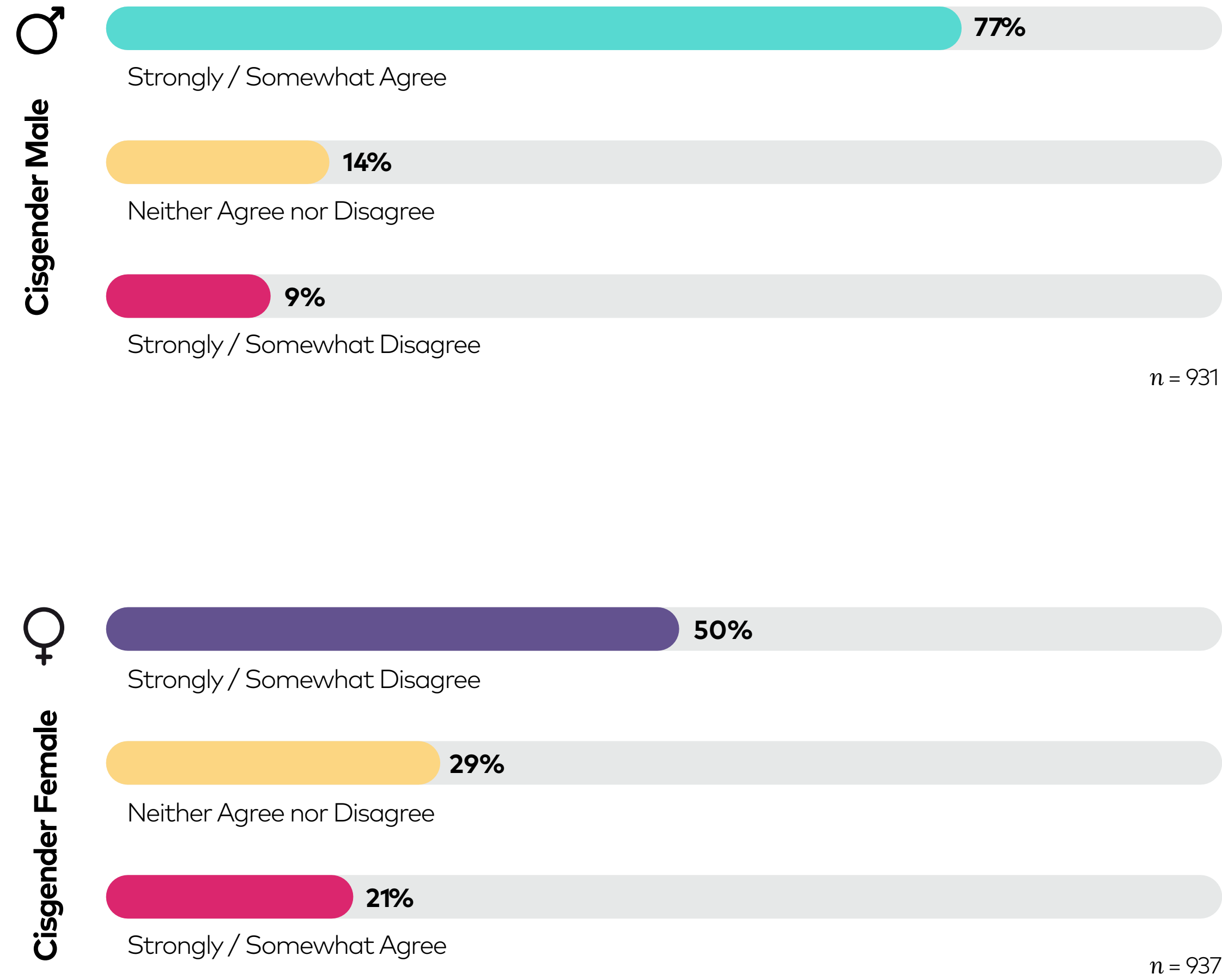
Only a slim majority of cisgender male respondents strongly or somewhat disagree (52%), with almost one-third indicating that they were encouraged to play with toys and games traditionally associated with girls (32%). Three in every five females agree (62%), around one-quarter are neutral (23%), and 14 percent disagree.

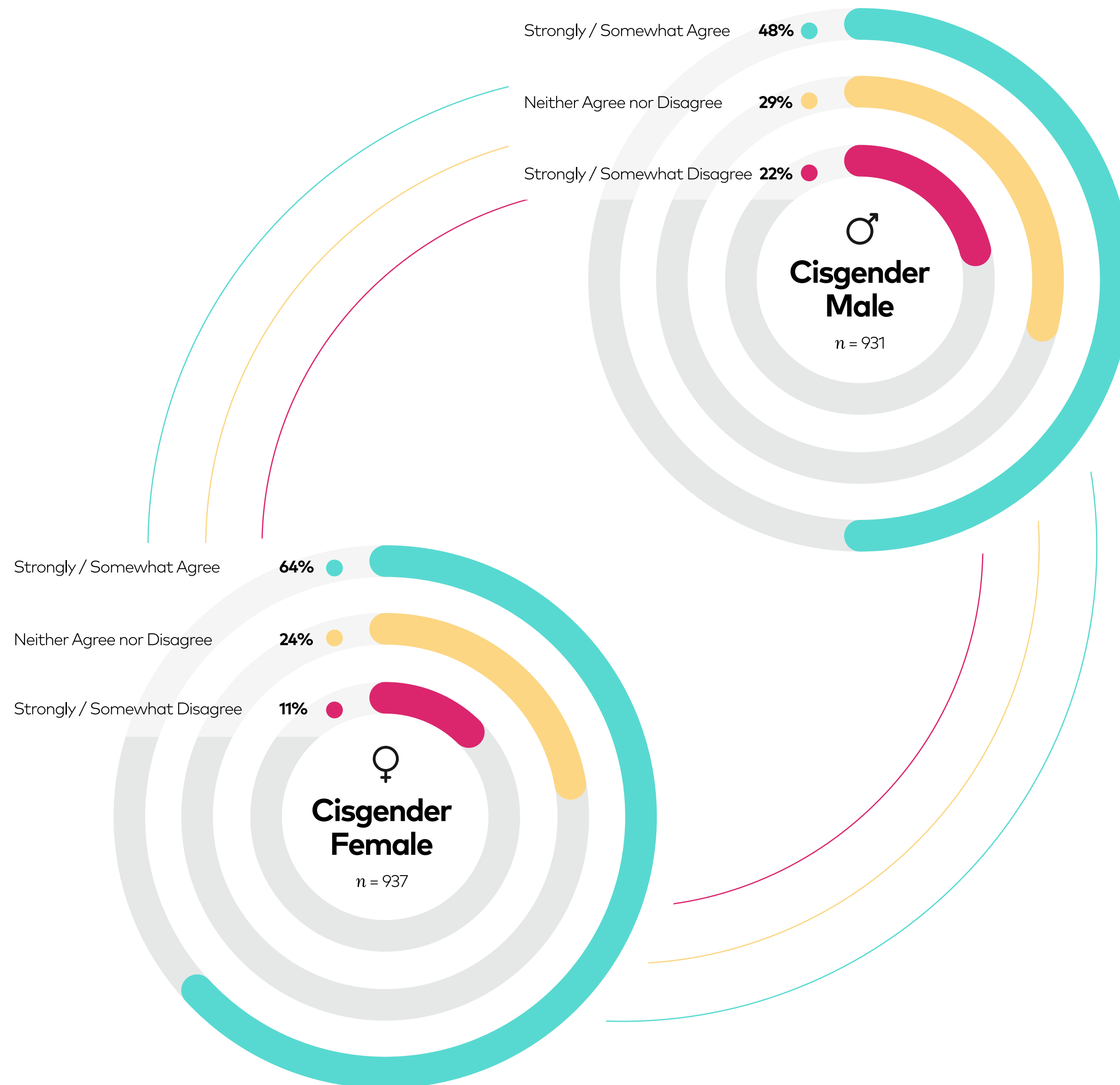


QUESTION 37

Growing up, My Parents/
Guardians Encouraged Me to Play
with Toys That Are Traditionally
Associated with Boys and Related to
Construction and Building or Fighting
and Aggression – Such as K’Nex and
Lego Kits, GI Joe Action Figures,
Tanks, and Toy Guns

When it comes to toys for boys, over three-quarters of cisgender male respondents strongly or somewhat agree (77%). One-half of all females disagree (50%), but more than one-fifth report receiving some encouragement to play with toys and games associated with boys (21%).

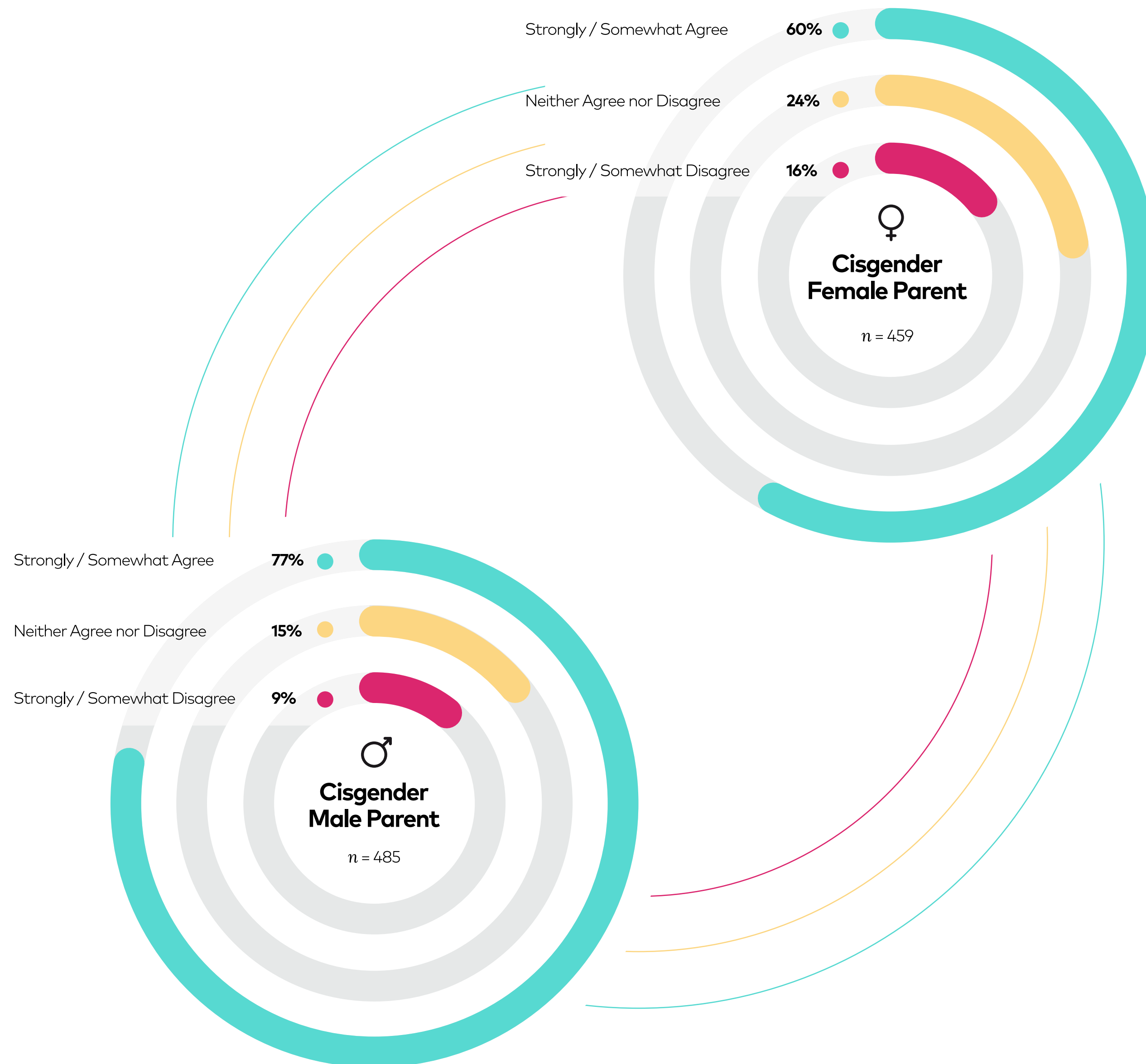




QUESTION 38

Growing up, My Parents/Guardians Encouraged Me to Play with Any Toys That Interested Me, Regardless of Their Traditional Associations with Girls or Boys

Approaching two-thirds of cisgender females report being encouraged to play with toys that interested them (64%), regardless of traditional association, in contrast with under one-half of males (48%).



QUESTION 40

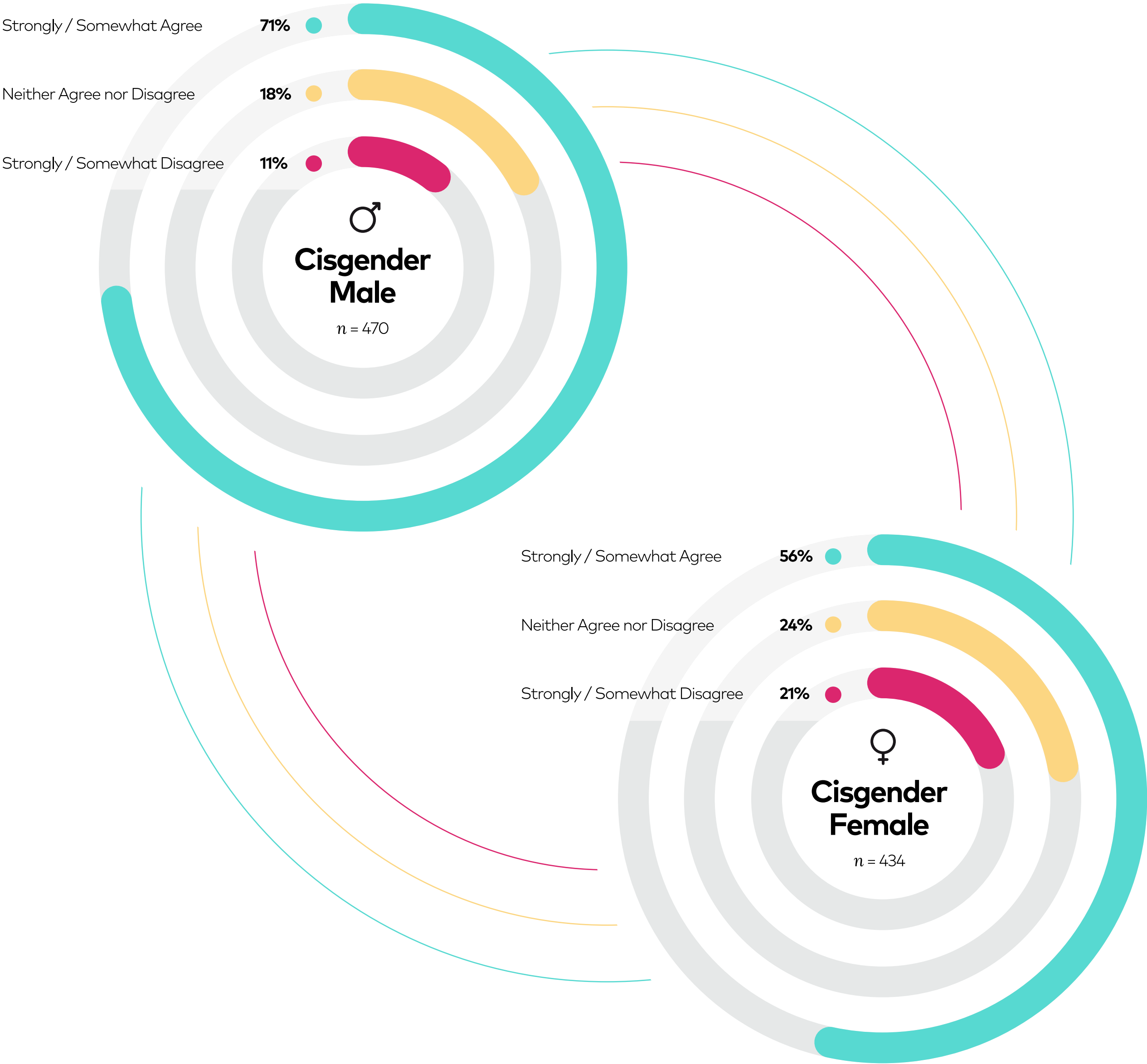
As a Parent, I Encourage(d) My Son(s) to Play with Toys and Games That Are Traditionally Associated with Boys

Over three-quarters of all cisgender male parents encourage their sons to play with toys and games traditionally associated with boys (77%), 17 percent higher than cisgender females. And for cisgender males with no college education, four-fifths do so (80%). Significantly fewer LGBTQIA+ parents encourage their sons to play with toys associated with boys - just 50 percent.

QUESTION 41

As a Parent, I Encourage(d) My Daughter(s) to Play with Toys and Games That Are Traditionally Associated with Girls

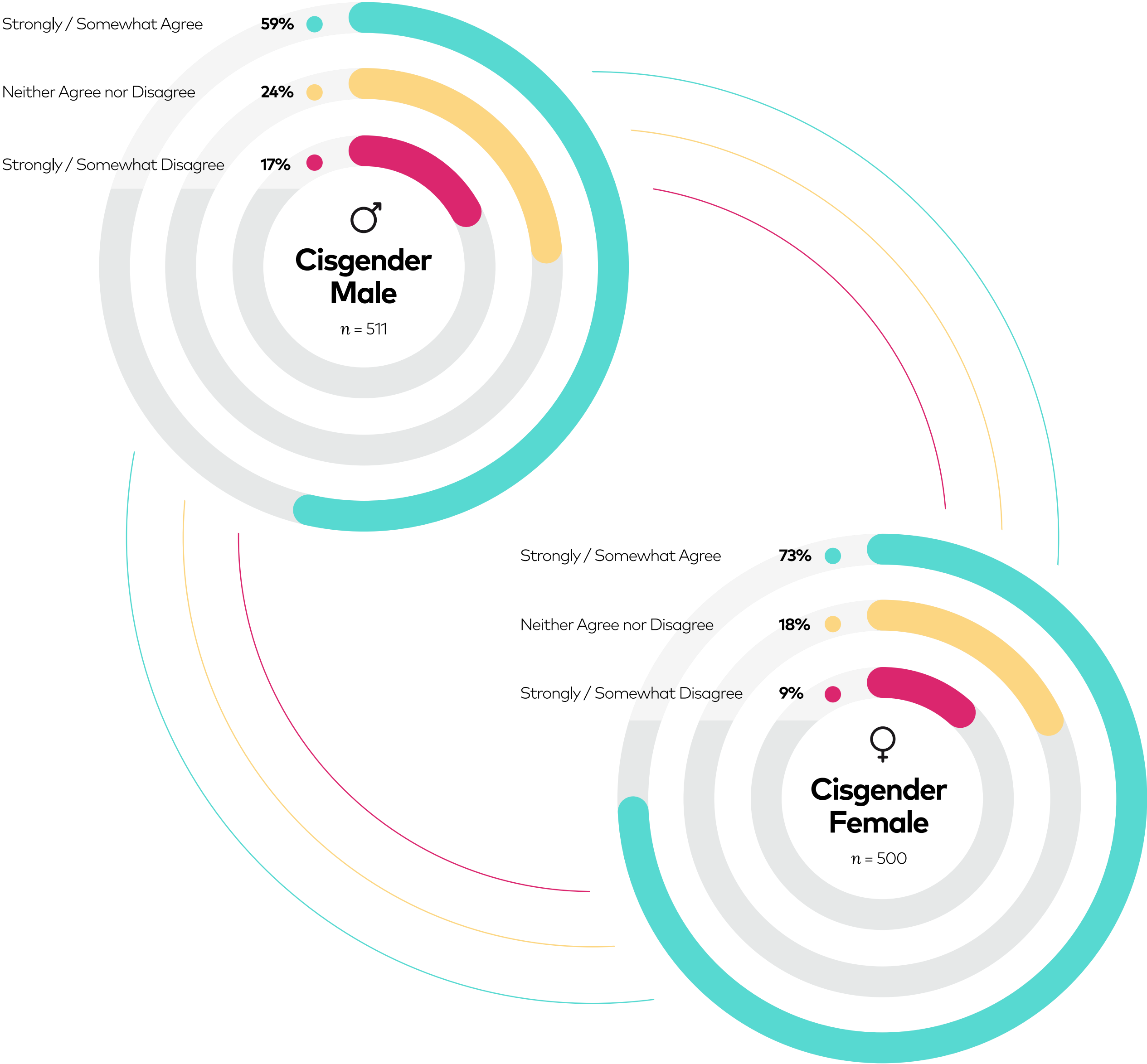
Responses to the preceding question are echoed here. Over two-thirds of all cisgender males encourage their daughters to play with toys and games traditionally associated with girls (71%), 15 percent higher than cisgender females. And again, cisgender males with no college education are the most likely to do so at 73 percent. Even fewer LGBTQIA+ parents encourage their daughters to play with "girl" toys at 42 percent.



QUESTION 42

As a Parent, I Encourage(d) My Child(ren) to Play with Any Toys and Games Play That Interest(ed) Them, Regardless of Traditional Associations with Girls or Boys

Approaching three-quarters of cisgender female parents encourage gender-neutral play for their children (73%), 14 percent higher than males (59%). Cisgender females with college education are even more likely (75%), while fewer than one-half of cisgender males without any college do so (48%). But the most likely to encourage play with whichever toys or games interest their kids are LGBTQIA+ parents, at 77 percent.





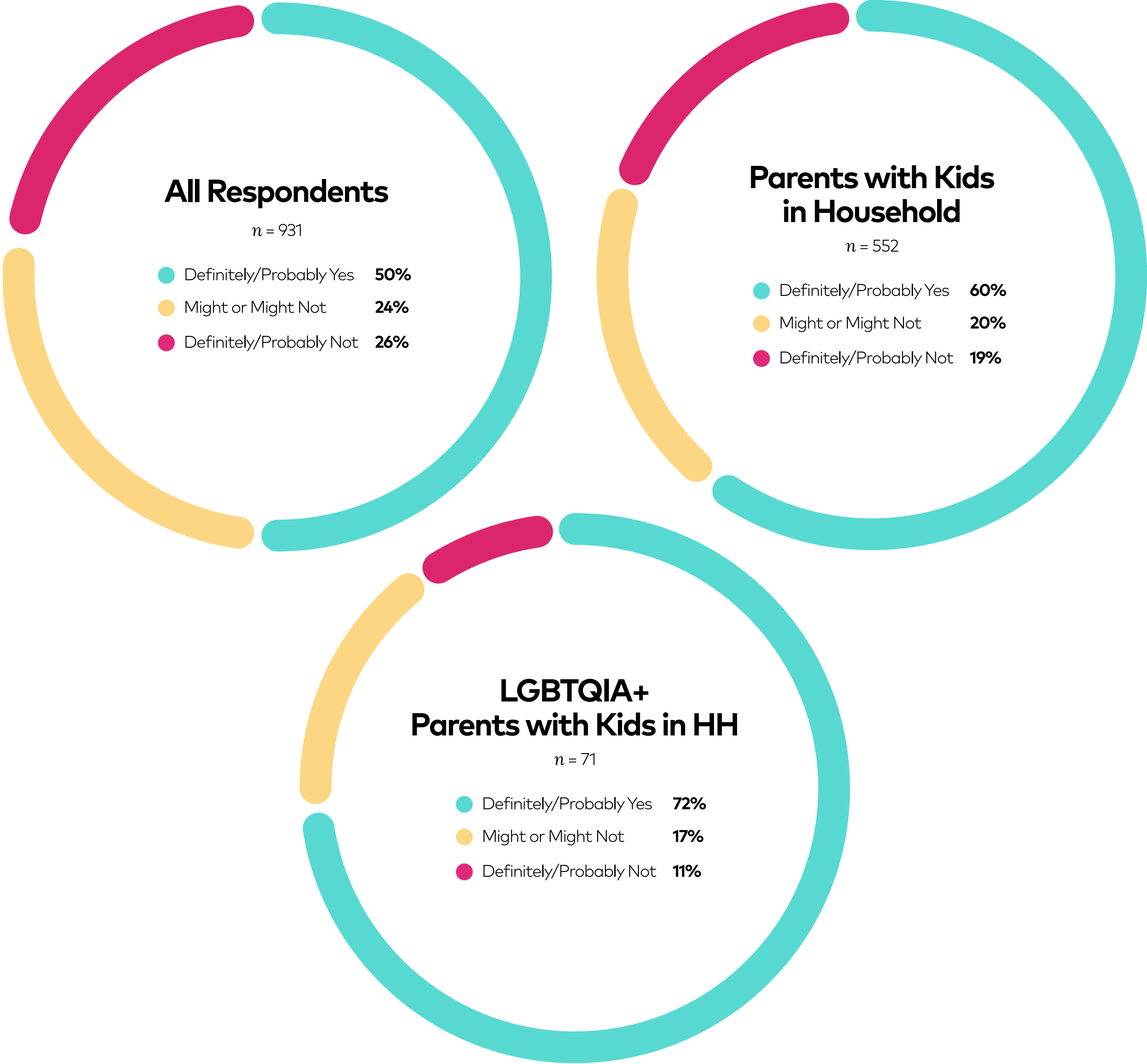
The World's First Gender-Neutral Doll

In 2019, toy company Mattel unveiled Creatable World™, a customizable doll line offering endless combinations all in one box. Extensive wardrobe options, accessories, and wigs allow children to style the doll, which resembles a prepubescent child, with short or long hair, or in a skirt, pants, or both. We asked respondents to watch a short promotional video for the brand before answering a couple of questions.

QUESTION 34

If You Know or Have a Child Aged from 5 to 8 Years, Would You Consider Giving a Creatable World™ Doll to Them?

While one-half of all respondents would consider giving a Creatable World™ doll to a child, parents with children in their household are more likely to do so, with cisgender males more likely (64%) than females (57%). Sixty-nine percent of all LGBTQIA+ respondents would consider giving a Creatable World™ doll to a child, with parents the most likely to do so (72%).

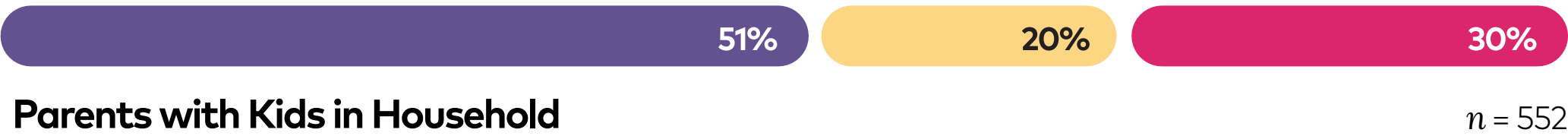
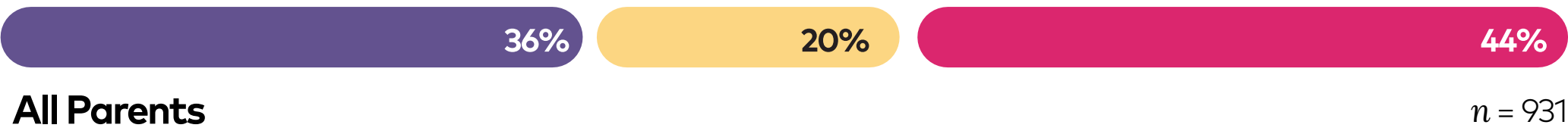


QUESTION 39

Would You Have Wanted a Creatable World™ Doll If It Had Been Available When You Were a Child?

A similar pattern plays out in response to the follow-up question. While a little over two-fifths of all respondents would not have wanted a Creatable World™ for themselves (44%), more than one-half of parents with children in their household say they would have (51%). Parents in the West and Midwest are more likely to do so - both at 54 percent. But the parents most likely are LGBTQIA+ respondents, at 62 percent.

The differences in responses between all parents and those with children currently in their households are explained by generation - empty nesters are most likely to be Boomers and the Silent Generation, who we have observed tend to be more conservative/traditional in their views.



● Definitely/Probably Yes ● Might or Might Not ● Definitely/Probably Not

10. Creatable World™ promotional video: <https://images-na.ssl-images-amazon.com/images/I/D16LidlZnES.mp4>

“I would have loved a Creatable World Doll! That looks like a fantastic toy design!”

FM, genderfluid, Gen Y, Northeast

“I preferred “boy” toys when I was a child, but I was expected to want to play with “girl” toys. I would have loved a Creatable World doll if it had been available. I believe all toys could benefit from a nonbinary approach to their design. All children should be able to play with all toys.”

AS, genderqueer, Gen Y, Northeast

“I’m not much for dolls or toys but it would have been cool to dress and create a person in whatever way I felt expressive.”

AS, agender, Gen Z, West

“I think I would’ve enjoyed a Creatable World doll a lot. It might have even helped me understand myself better.”

RG, nonbinary, Gen Z, Midwest



The Creatable World™ Creator's Perspective

"I think that dolls are tools for playing out the roles that you will have when you grow up. I will say that not only girls play with dolls and not only boys play with action figures. I think it's important for us in the toy industry, especially as we talk about diversity and inclusion, to open up who the toys are for. In general, we could say that it's mostly girls that play with dolls or mostly boys that play with action figures, but on this journey to being more inclusive as an industry, I love the idea of thinking about it more through a lens of storytelling experience. And in that sense, I would say that action figures and dolls are very similar. They're personifications. They look like human beings on some level, right? So some may look less like actual human beings than others, but it almost becomes a totem for projection of self."

Kim Culmone, SVP, Global Head of Design Barbie & Fashion Dolls, Mattel

Interviewed on **The Playground Podcast**, Oct 26, 2020¹¹

11. Anchor. "Kim Culmone: The Ultimate Designing Woman for Barbie and Mattel by The Playground Podcast • A Podcast on Anchor." Accessed January 11, 2021. <https://anchor.fm/the-playground-podcast/episodes/Kim-Culmone-The-Ultimate-Designing-Woman-for-Barbie-and-Mattel-eljtm2>

Gender-Free Education

Recognizing that the negative impact of gender stereotyping can start early in a child's life, over the last few years, some European institutions attended by kids of pre-k, kindergarten, and middle school age have started to offer gender-free education programs. Sweden, consistently ranked by the World Economic Forum as the fourth most gender-equal society in the world, has been a leader in the gender-free education movement. Its national curriculum requires that preschools "counteract traditional gender roles and gender patterns," for instance, by avoiding gender labels for toys and books. Teachers address children as a group with "friends" rather than "boys and girls," and individually, by their first names only, using a gender-neutral pronoun in place of the binary of her/hers and him/his.

Curious about how US respondents would react to this scenario, we asked them to indicate whether they would approve or disapprove of the idea.



Sweden and Germany Offer Gender-Neutral Education. In Early Learning Settings, Children Are Referred to Only by Their First Name and All Toys and Books Are Non-gendered. Would You Approve or Disapprove of Pre-schooling That Does Not Refer to “Boys” or “Girls” and Uses Gender-Neutral Pronouns?

Overall, 43 percent of all parents approve, but more than one-third disapprove (35%), with cisgender male parents without any college education 12 points more likely to disapprove (47%). Notable differences in response to the question are related to generational cohorts, with parents aged 18 to 55 being more likely to approve of non-gendered early education in contrast with those aged 56 and older, who are more likely to disapprove of the idea. LGBTQIA+ parents are among those most likely

to approve at 64 percent. Regionally, approval is slightly stronger among parents in the Northeast, where 46% approve, and weaker in the South and Midwest, where 36 percent of all parents disapprove. Respondents who think of themselves as Republicans are significantly more likely to disapprove, with 49 percent doing so, in contrast to the almost two-thirds of Democrats who approve (65%).

All Parents

Strongly/Somewhat Approve	43%
Strongly/Somewhat Disapprove	35%
Neither Approve nor Disapprove	22%
n = 1,066	

Gen Z Parents (18-24)

Strongly/Somewhat Approve	53%
Strongly/Somewhat Disapprove	21%
Neither Approve nor Disapprove	26%
n = 72	

Gen Y Parents (25-39)

Strongly/Somewhat Approve	63%
Strongly/Somewhat Disapprove	35%
Neither Approve nor Disapprove	14%
n = 271	

Gen X Parents (40-55)

Strongly/Somewhat Approve	42%
Strongly/Somewhat Disapprove	32%
Neither Approve nor Disapprove	26%
n = 292	

Boomer Parents (56-74)

Strongly/Somewhat Approve	32%
Strongly/Somewhat Disapprove	45%
Neither Approve nor Disapprove	24%
n = 72	

Silent Generation Parents (75+)

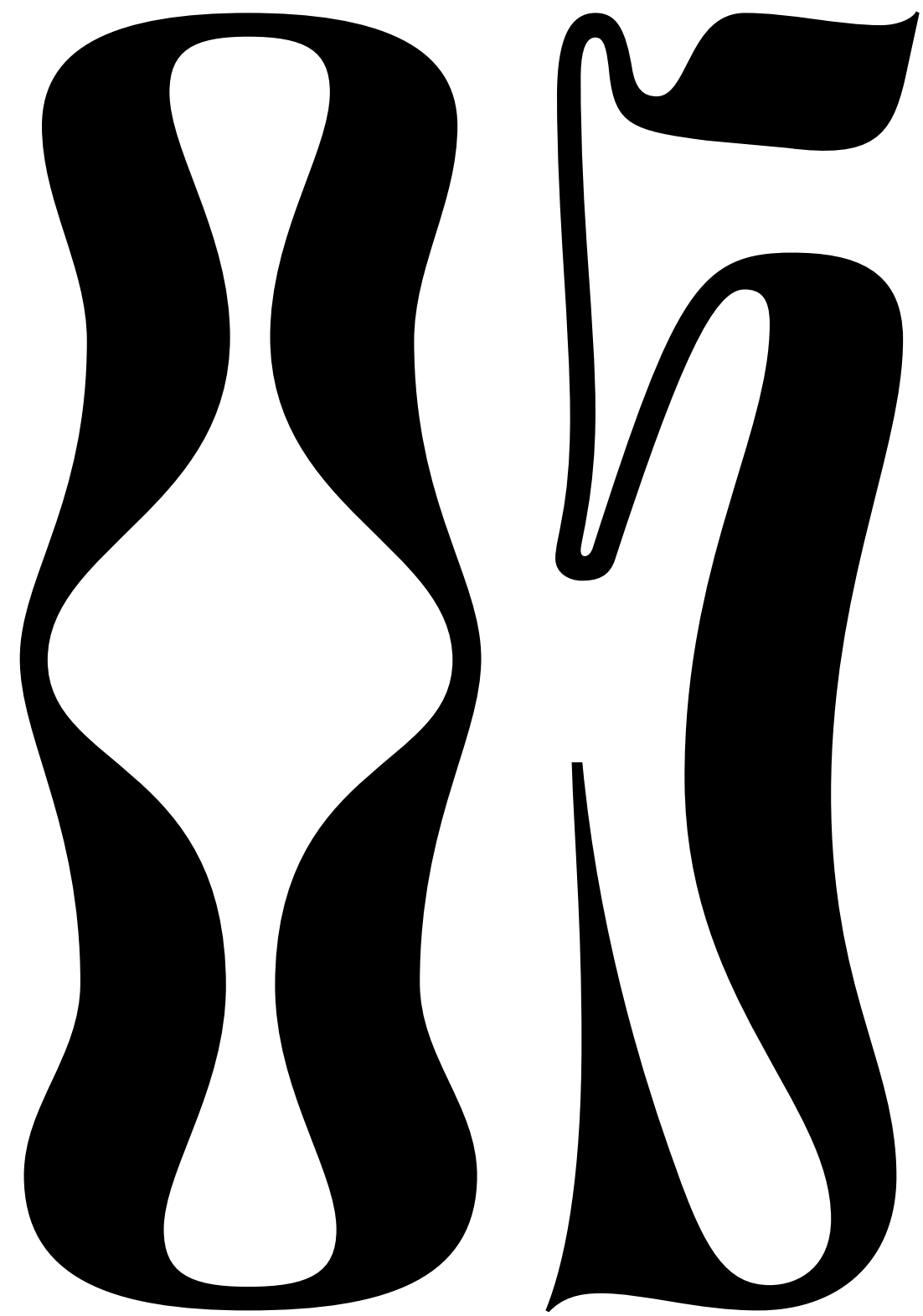
Strongly/Somewhat Approve	21%
Strongly/Somewhat Disapprove	52%
Neither Approve nor Disapprove	24%
n = 99	



What Are Your Pronouns?

The English language lacks a gender-neutral singular pronoun to correspond neatly with "everyone" or "someone", and as a consequence "they" has been used for this purpose for over 600 years. To refer to a person whose gender identity is nonbinary, there are many options. In our quantitative study, one-half of respondents identifying as nonbinary indicated their preferred pronouns are they/them/their (50%). Fourteen percent prefer she/her/hers, and the same percentage prefer he/him/his. Seven percent prefer ze/hir/hirs.

Read: What's Your Pronoun: Beyond He & She by Dennis Barron

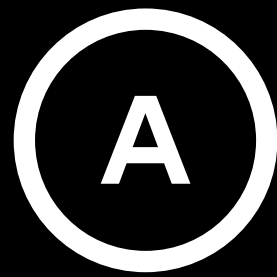


EXPRESSING GENDER

Bigeye National Study 2021 | Gender: Beyond the Binary

BEYOND THE BINARY





s we have seen in the preceding sections, the ways in which gender is depicted in popular media and the toys we play with as children

shape our experiences from an early age, and the roles deemed "acceptable" for men and women. Nonbinary, transgender, and genderfluid identities challenge these societal norms, so we wanted to understand how consumers most commonly express their identities and how important gendered products are to them.

Sam Smith

British Grammy Award-winning singer-songwriter Sam Smith came out as gender nonbinary in a GQ interview in June, 2019.

Elliot Page

Oscar-nominated "Juno" actor Elliot Page came out as a nonbinary and transgender person in December 2020 and uses the pronouns "he/they".

Jonathan Van Ness

The grooming guy from Netflix makeover show "Queer Eye" came out as nonbinary in June 2019. Van Ness prefers the pronouns "he/him", but does not identify as a man.

Caitlyn Jenner

Olympic gold medalist Caitlyn Jenner was 65 years old when she officially came out to the world as a transgender woman.

QUESTION 44

A Person’s Appearance or Style of Dress Can Express Their Gender and How People Describe Them. How Do You Think Other People Would Describe You?

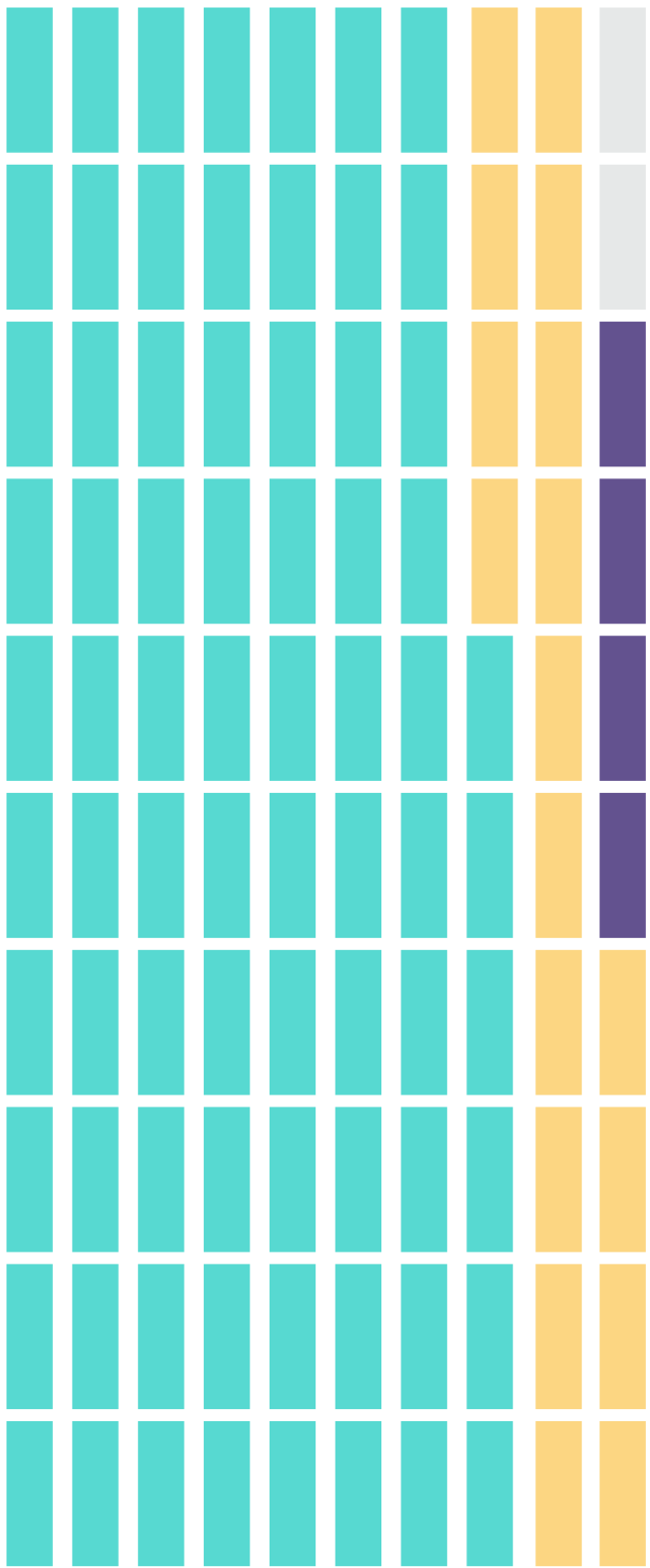
The results echo how respondents place themselves on a spectrum from masculine to feminine, with those identifying as female more likely to believe their stronger feeling of femininity is reflected in how others describe them.



Identify as Male

- Very/Somewhat Masculine 71%
- Equally Feminine and Masculine 14%
- Very/Somewhat Feminine 13%
- Other 2%

n = 959



Identify as Female

- Very/Somewhat Feminine 76%
- Equally Feminine and Masculine 18%
- Very/Somewhat Masculine 4%
- Other 2%

n = 959

“Appearances are how people police themselves and each other, and that’s why even gender nonconforming cis people can be victimized by transphobia. If you consider gender as a performance, stereotypes are integral to how gender exists in our perceptions. There are basic elements of wardrobe, gait, style, things that are socially tied to gender even though they have nothing to do with gender at all.”

RG, nonbinary, Gen Z, Midwest

QUESTION 45

Which of These Best Describes Your Choice of Clothing? Please Select One

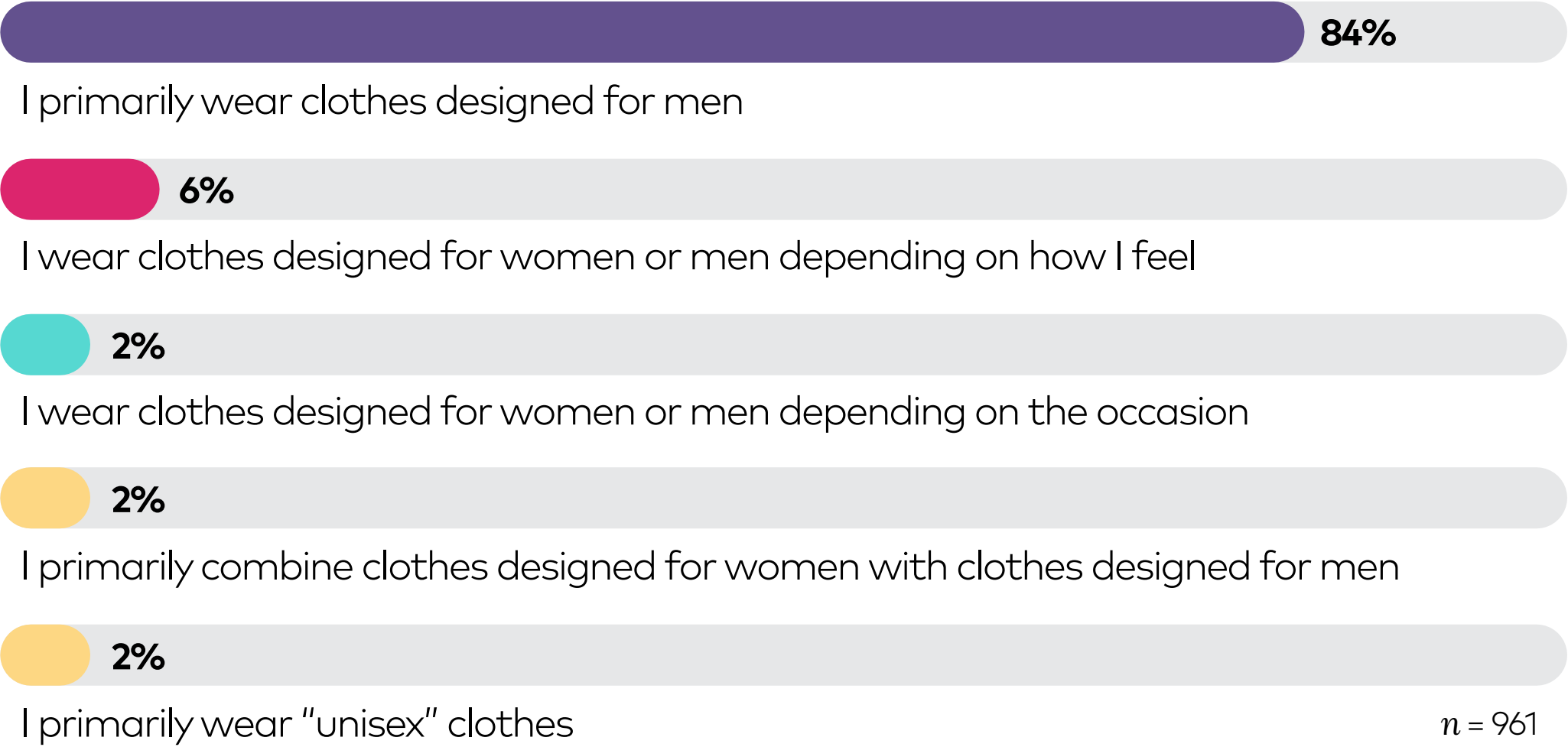
Over four-fifths of those who identify as male primarily wear clothes designed for men (84%), and over two-thirds of respondents who identify as female wear clothes designed for women (69%).

Among respondents who identify as male, 99 percent of the Silent Generation primarily wear clothes designed for men, compared to 71 percent of Gen Z-ers. Among respondents who identify as female, less than one-half of Gen Z primarily wear clothes designed for women (45%) and are the cohort most likely to wear clothes designed for women or men depending on how they feel (28%).

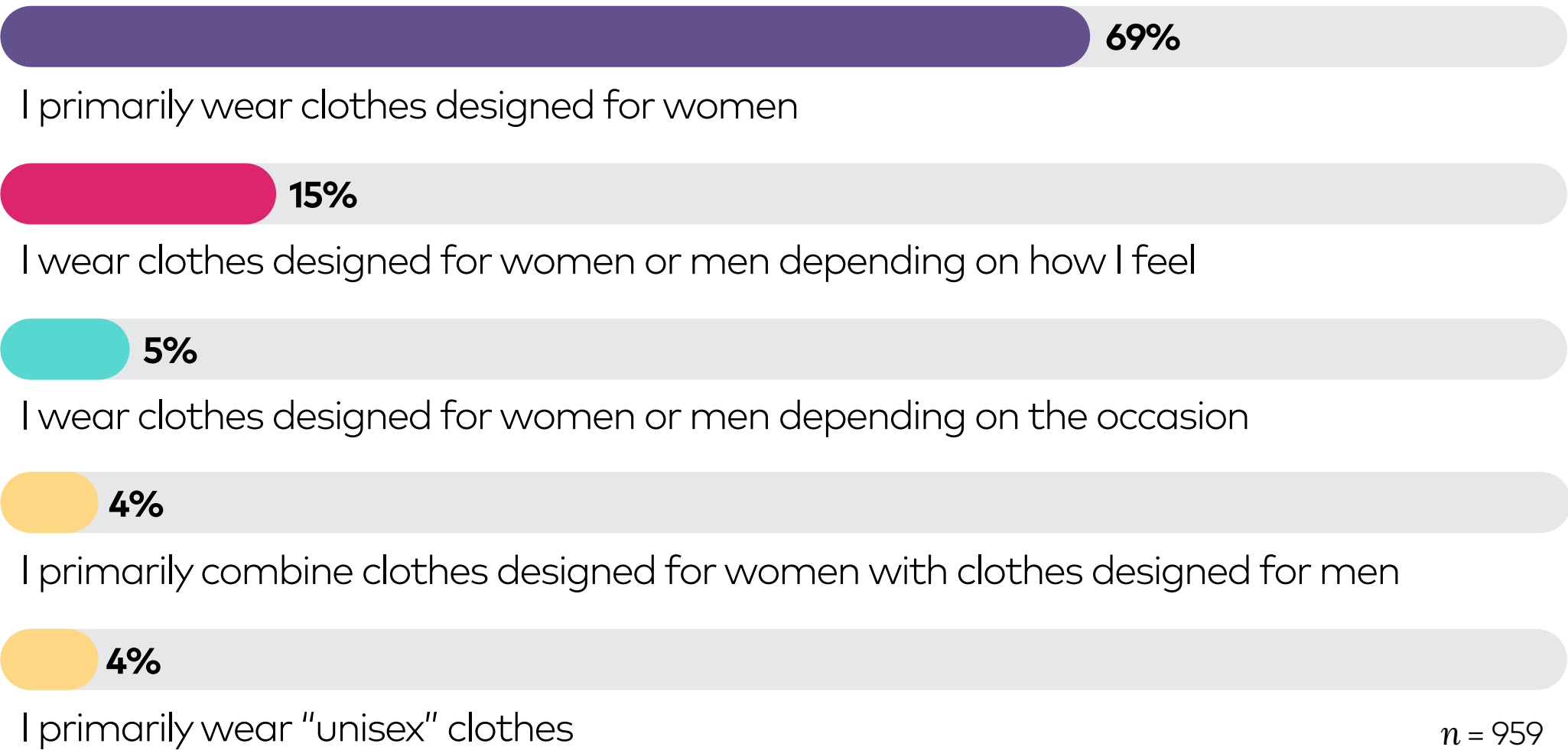
Ninety percent of those who identify as gay report primarily wearing clothes designed for men, while over one-third of females who also identify as lesbian wear clothes designed for women or men depending on how they feel (36%), a higher percentage than those who say they primarily wear clothes designed for women (29%).



Identify as Male



Identify as Female



“Because I’m Black, I focus especially on buying Black-owned products. I will say that it’s much more normal in Black LGBTQIA+ groups to have folks who look outside of typical gender representations.”

BM, nonbinary, Gen Y, Midwest

“I wear boy’s and men’s clothing. I prefer Apt. 9, Chaps, and Levi. These brands allow me to look like I’m wearing clothes that were made for me. I look like a masculine adult, not someone wearing children’s clothing. I am a small, masculine person. I purchase all my under-garments from TomboyX. They are queer-owned and their clothing is gender-neutral.”

AS, genderqueer, Gen Y, Northeast

“I’ve gotten a lot of clothes I like from Target, particularly the Original Use line. I think it’s because they use more fun patterns/prints than I usually see for men’s clothes. I want clothing that matches my gender but still has a unique style. I think dressing eccentrically and looking ‘weird’ is fun.”

RG, trans man, Gen Z, South

“I am not particularly brand loyal. I gravitate towards places where I can shop without being stared at too hard for buying clothes for any gender. There is a thrift-store nearby that I have donated a lot to, and I can buy whatever in there, and they don’t care. I will get clothes from the section for men, especially shirts or pin-stripe pajamas, and also from the women’s section, where I get pants and shorts that fit me better. I already know my men’s size in shoes so I can order boots for myself.”

FM, genderfluid, Gen Y, Northeast



QUESTION 46

Do You Wear Makeup?

Among respondents who identify as male, 100 percent of the Silent Generation never wear makeup; those most likely to do so belong to Gen Y, 10 percent of whom do so daily, and 14 percent report doing so 4-6 times a week. For respondents who identify as female, Gen Z and the Silent Generation are about equally as likely to never wear makeup (29% and 28%, respectively), while those most likely to wear makeup daily are Boomers (27%).

Among LGBTQIA+ respondents, approaching one-quarter of those who identify as gay wear makeup (23%), 6 percent daily, and 10 percent once a week.

In contrast, those who identify as lesbian are more likely than other females never to wear make up (57%). Of those that do, only 7 percent do so daily.

Clothing and cosmetics are among the most visible ways in which individuals can express their gender identities. But many categories of consumer products are also designed, formulated, and marketed to appeal primarily to men or women. We were interested in learning whether gender identity influences consumers' purchasing habits.



Genderless Skincare

Gender-neutral marketing is already well established within the beauty industry. Rather than creating "female" or "male" products, innovative brands in the cosmetic space have positioned themselves towards a "skin-having" audience, who just need products that work. Genderless skincare brands include Be Plain, 456 Skin, náu, Frank's Remedies, The Glowcery, and Humanrace, created by Pharrell Williams. Among qualitative study participants who identify as nonbinary, gender non-conforming and genderfluid, Rihanna's Fenty Skin products are the most commonly purchased.

QUESTION 48

How Accurately Does This Statement Describe You? I Usually Buy Products That Are Specific to My Gender Identity, Rather Than Non-gendered Products or Products That Reflect a Different Gender

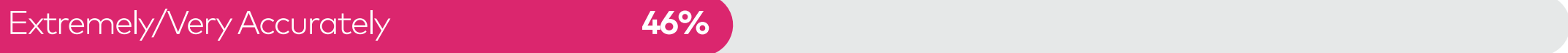
Approaching three-quarters of respondents who identify as male purchase products that align with their gender (73%), making them the most likely to do so. Respondents who identify as female trail by 6 points (67%), but fewer than one-half of all LGBTQIA+ respondents do (46%), with those identifying as lesbian the least likely to consider doing so (36%).



Identify as Male n = 960



Identify as Female n = 958



Identify as LGBTQIA+ n = 218

Many Consumer Products Are Designed, Packaged, and Advertised to Appeal to a Particular Gender. Do You Think the Products Themselves Are Different Enough to Warrant Versions for Women and Men?

Overall, clothing and perfumes/aftershaves are the top two selections. Thirty-nine percent of males consider gendered versions of razors beneficial, compared to 30 percent of females. Just under one-half of all LGBTQIA+ respondents believe that gendered clothing is beneficial (46%) but those who identify as lesbian are the least likely (37%).

One-fifth of all respondents identifying as female believe that none of the consumer product categories benefit from being gendered (20%), compared to just 11 percent of males. While those aged 18-55 are equally likely to see no benefit to gendered products (14%), the percentages rise

for Boomers (19%) and members of the Silent Generation (23%). Consumers in the Midwest are most skeptical about the benefits (21%), and although a small sample size, those most likely to believe that none of the categories benefit from gendered versions are respondents who identify as nonbinary, at 29 percent - something we also heard in our qualitative research.

Identify as Male

Clothing.....	61%
Perfumes / Aftershaves	44%
Razors	39%
Shampoos, Conditioners.....	34%
Soap, Skincare Products	34%
Makeup.....	30%
Vitamins / Nutritional Supplements	29%
Children's Books and Toys.....	28%
Hair Dyes	24%
Greetings Cards.....	21%
Toothpastes.....	21%
DIY Tools.....	12%
Home Appliances	11%
None of These Benefit.....	11%

n = 959

Identify as Female

Clothing.....	51%
Perfumes / Aftershaves	47%
Makeup.....	34%
Soap, Skincare Products	34%
Vitamins / Nutritional Supplements.....	33%
Razors	30%
Shampoos, Conditioners.....	30%
Children's Books and Toys.....	24%
None of These Benefit.....	20%
Greetings Cards.....	19%
Hair Dyes	18%
Toothpastes.....	12%
DIY Tools.....	8%
Home Appliances	7%

n = 956

“Toiletries are constantly gendered and it is completely unnecessary. They should be labeled with the qualities of the product and the fragrance, if any. No mention of male or female is needed.”

AS, genderqueer, Gen Y, Northeast

“Clothes are the most gendered product. Also, the clothes are legitimately made in the most inconvenient way for AFAB¹² folks (e.g. no pockets in women’s pants). I think clothes, shoes, etc., should just be made neutrally and allow for folks to pick and choose what works best for them.”

AS, agender, Gen Z, West

“Many people I know in my personal life will stop buying products if they think they are gendered in an extra-absurd way. Colgate Max White makes powerful peppermint-flavored toothpaste with the label ‘For Men’ on it, as if different genders don’t have the same materials in their teeth! Some of it I think could be laughable, if I didn’t think the gendered advertising was causing so much damage to people’s psyches.”

FM, genderfluid, Gen Y, Northeast

“This stuff drives me nuts. The same shampoo ingredients, and one is in white bottles, and floral, and the other is on a whole ‘nother aisle, and is in black and blue bottles, with names like ‘Lightning’ or whatever crap ... It really should not be that difficult to market in a non-gendered way. Just market to humans. Would a human like this? Why or why not? Well, there you go.”

EW, genderqueer, Gen Y, South

12. AFAB: Assigned Female at Birth

In an Open-Ended Question, We Asked Respondents to Explain Why They Selected Their Response to the Preceding Question. Just under Half of Responses Were Neutral in Tone (48%), 28 Percent Were Negative, and 22 Were Positive. Here Are Some of Those Responses:

"Cleansing items have scents that would be odd smelling from a guy. Vitamins probably work better with certain genders. Since our bodies are different, that also means our clothing would be differently fitted."

Identifies as Male, Gen Z, Virginia, Suburban, High school graduate, Race not listed, Muslim

"Shampoos and conditioners specific to women's hair as well as soap and skincare products are so much more nurturing than men's products, and vice versa. Some vitamins and nutritional supplements are specific to the biology of different genders, so it's important that they are gender- specific."

Female, Gen Z, Alabama, Suburban, Some college but no degree, White, Christian (non denominational)

"Women have different skin and hormone levels than men thus different skin care needs. I presume men don't want to wear powdery, floral perfumes that some women like."

Female, Gen X, California, Urban, Master's degree, Asian/Pacific Islander, Universalist

"I don't want to use a razor for men."
Female, Boomer, Wisconsin, Rural, High school graduate, Native American/Alaskan Native, Catholic

Positive
Negative

"There's no benefit to having differently gendered products, except for companies to make more money. The only thing that maybe benefits is vitamin supplements, but I feel that supplements should be catered to the person and their specific needs rather than for their biological sex."

Female, Gen Y, Wisconsin, Urban, Bachelor's degree in college (4-year), White, Wiccan

"It shouldn't matter what gender it's for. I've found that using men's deodorant and men's razors work a lot better for me, even though I am a woman. I don't think anything should be targeted towards one gender. You should be able to like what you like."

Female, Gen Z, Alabama, Suburban, Some college but no degree, Multi/Biracial, Agnostic

"Does a woman's razor shave any different than a man's razor? I think the main difference in men's vs women's products is the smell, not the effectiveness."

Male, Boomer, New Jersey, Suburban, Some college but no degree, White, Not Religious

"I have a huge problem with there being male and female versions of these - why do I have to buy a pink razor (and pay more!) when a blue razor works exactly the same?"

Female, Gen X, Pennsylvania, Suburban, Bachelor's degree in college (4-year), White, Methodist



Ritual Multivitamins Embraces Nonbinary and Trans Customers

The Los Angeles-based, direct-to-consumer multivitamin brand Ritual is a category disruptor. Eschewing the usual “more is more” mantra of most traditional multivitamins, the company’s products use fewer ingredients that are drawn from transparent supply chains and cater to all gender identities and expressions.

In conversation with Bigeye’s In Clear Focus podcast, Senior Director of Marketing, Claire Knebl, explained how her previous role with beauty brand Glossier influenced the way she approaches building the Ritual brand. This includes providing advice specifically for teens who identify as trans or nonbinary. The strategy behind this more inclusive approach recognizes that specific nutrient recommendations can vary depending on sex, life stage, and other factors,

and that many people have nutrient gaps in common.

“We do whatever we can within our guardrails to make sure that we provide as much guidance to make sure everyone can find the right ritual for them - which is oftentimes in partnership with their doctor. We do the best we can to really welcome people in throughout the brand - we would love for everyone to have a Ritual product for them, so we do whatever we can to make sure that whoever comes to our website and is interested in our brand gets the direction that they deserve in order to find what’s best for them.”

Visit: <https://ritual.com/>



Gender-Based Pricing Banned in New York

A 'pink tax' ban in the state of New York aims to curb price discrimination between similar products and services based on whether they are marketed towards men or women.

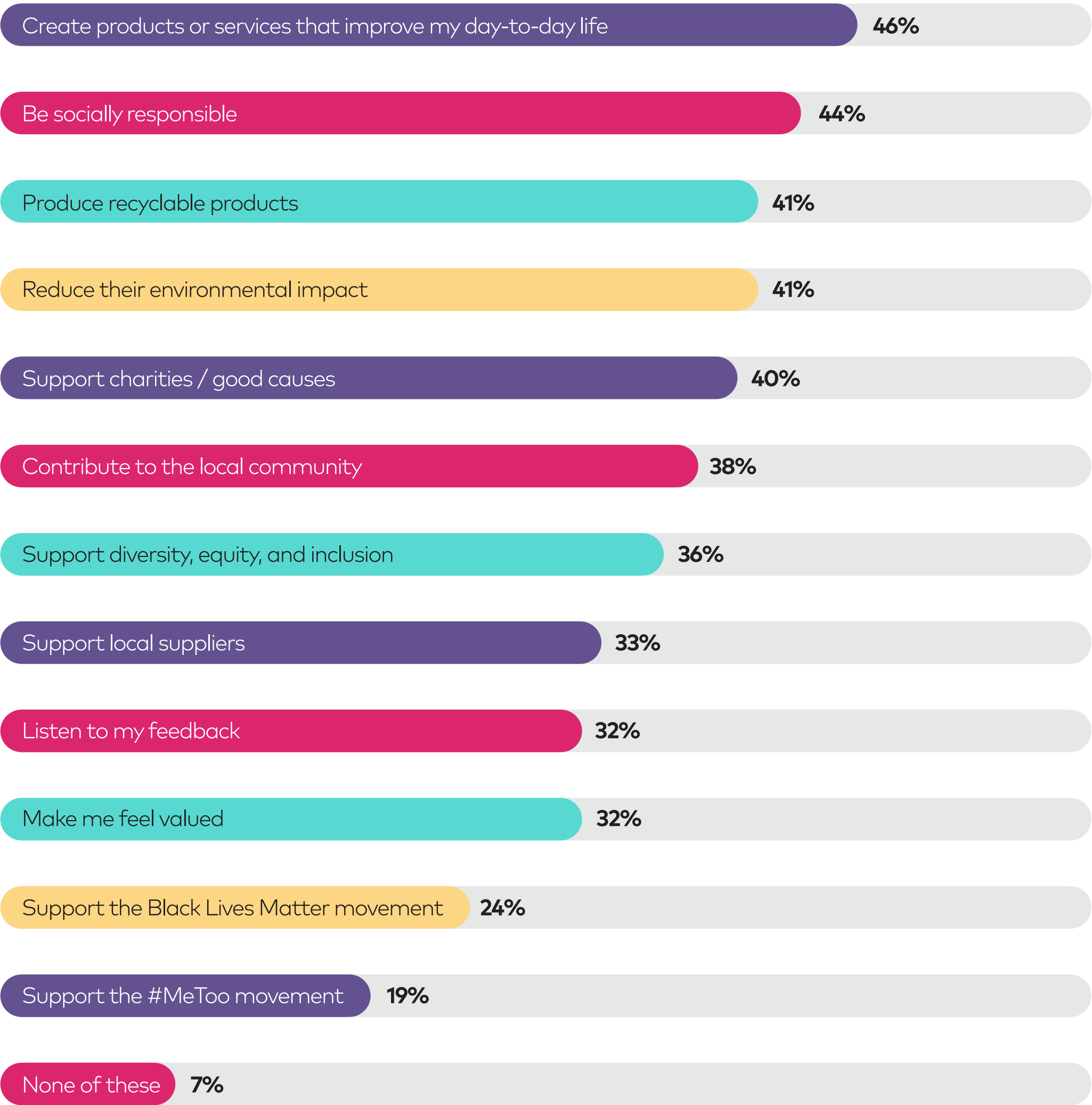
Introduced by governor Andrew Cuomo in April 2020, the ban prohibits gender-based price discrimination under State law. It covers everything from goods such as deodorant or razors and services including dry cleaning and hairdressing. The law means barbershops and hair salons are not allowed to price their services based on gender. Prices can vary, however, based on a number of criteria including time, difficulty, and labour required.

Research by the New York City Department of Consumer Affairs reported that overall, personal care products cost an average of 13 percent more for women than those for men, and that hair care products cost women 48 percent more than men.

QUESTION 51

Which of These Things Do You Most Want Consumer Brands to Do? Please Select All That Apply.

- Creating products or services that improve people's lives is the top answer overall, but for older respondents, this is especially true: 58 percent of Boomers and 64% of the Silent Generation selected this.
- More than one-half of all respondents identifying as female want brands to be socially responsible (51%).
- For Gen Z respondents, their top consideration is support for diversity, equity, and inclusion (40%) along with supporting charities and good causes (38%).
- Producing recyclable products was the second-most frequently selected option among Boomers (51%) and the Silent Generation (57%) compared to just one-third of Gen Z (33%).
- For respondents who identify as Black or African American, supporting the Black Lives Matter Movement is the most frequently selected option (35%).
- LGBTQIA+ respondents want brands to be socially responsible (49%) and to support diversity, equity, and inclusion (48%).



“I have purchased from MAC and Kenneth Cole in the past because of their financial and social support for eradicating HIV/AIDS, which has impacted the lives of so many of those close to me who also identify as queer, nonbinary, and trans.”

CT, nonbinary, Gen Y, Northeast

“Target is very accommodating of trans employees and they keep their Pride display even in more conservative areas. Most importantly though, they have made donations to LGBT organizations. Actions speak louder than words.”

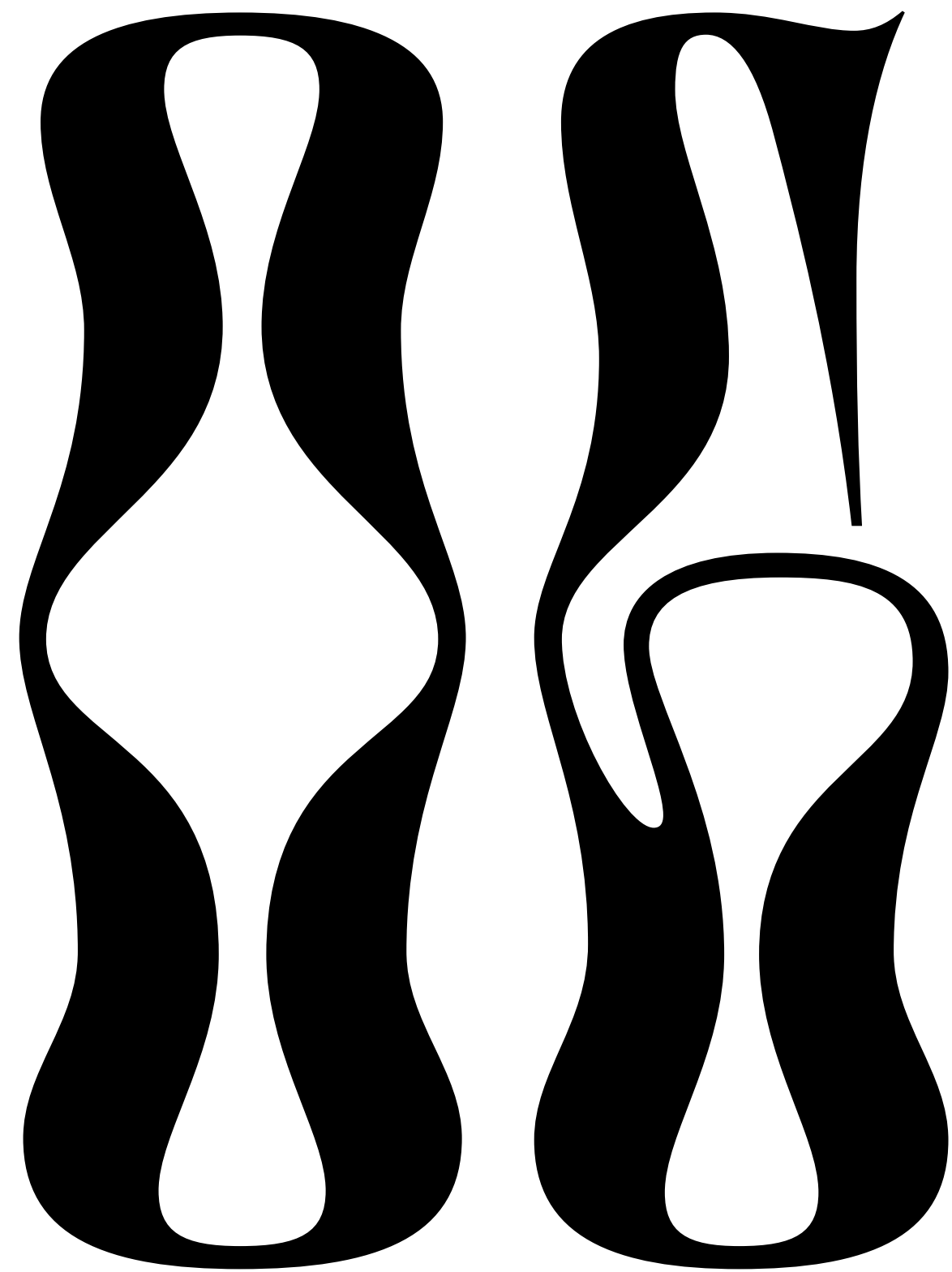
BM, nonbinary, Gen Y, Midwest

“I get suspicious of brands that are usually gendered, but put out lines of gender-neutral things, as if they are doing something revolutionary when they helped create the problem. Brands getting it right: TomboyX, Subaru, Dove, Absolut, and quite a lot of video game companies like BioWare and Naughty Dog.”

EW, genderqueer, Gen Y, South

“I’ve avoided brands like Dolls Kill, Kat Von D, and Victoria’s Secret because of controversies related to racism, homophobia, and transphobia on the part of their management. I try to stick to brands that are putting in some kind of effort to do better, to uplift people with their platform and give something to the world rather than taking.”

RG, nonbinary, Gen Z, Midwest

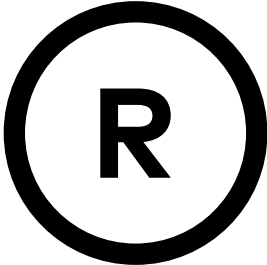


THE FUTURE OF GENDER

Bigeye National Study 2021 | Gender: Beyond the Binary

A portrait of a person with short hair and glasses, looking directly at the camera. The image is heavily stylized with a red and purple color gradient. The person's face is partially obscured by the text 'NON BINARY'.

NON BINARY



Responses to open-end questions reflect the broad spectrum of opinions about gendered products, so for our final questions, we wanted to understand the degree to which respondents feel traditional gender roles might change, if at all, over the next decade.

Overall, more than two-thirds of respondents agree (67%) but with the exception of those belonging to the Silent Generation, respondents of other generations are more likely to believe that Gen Z is better informed about nonbinary and transgender identities than Gen Z respondents themselves. Respondents who think of themselves as Republican and Independent are about as likely to agree, at 61 and 62 percent respectively, compared to over three-quarters of Democrats (77%).

And among LGBTQIA+ respondents, the differences are even more marked: fewer than the national average, 55 percent of Gen Z respondents agree that their cohort is better informed about nonbinary and transgender identities - whereas over four-fifths of Gen Y (82%) and 88 percent of LGBTQIA+ Boomers agree.

QUESTION 52

People Aged under 25 Are Better Informed about Nonbinary and Transgender Identities Than Older Generations

Gen Z

64%

Strongly /
somewhat agree
n = 415

Gen Y

72%

Strongly /
somewhat agree
n = 468

Gen X

65%

Strongly /
somewhat agree
n = 428

Boomer

68%

Strongly /
somewhat agree
n = 482

Silent Generation

61%

Strongly /
somewhat agree
n = 159

QUESTION 53

Children Would Be More Open to Working in a Broader Range of Occupations as Adults If the Toys They Played with and / or Their Early Education Were Gender-Neutral

Fewer than one-half of all respondents agree (46%) but, mirroring the results to the previous question, Gen Y emerges as being most likely to agree with the statement. Overall, female respondents are around 4 points more likely to agree than males, with very little difference between parents and non-parents. Political affiliation matters here: just over one-third of Republicans agree (35%) compared to 3 in 5 Democrats (61%). The group most likely to support gender-neutral toys and early education are LGBTQIA+ parents with children under 18 in their household, of whom almost two-thirds agree (65%).



52% **Gen Z**
Strongly / Somewhat Agree
n = 415

59% **Gen Y**
Strongly / Somewhat Agree
n = 468

40% **Gen X**
Strongly / Somewhat Agree
n = 428

37% **Boomer**
Strongly / Somewhat Agree
n = 482

44% **Silent Generation**
Strongly / Somewhat Agree
n = 159

One week before former President Donald Trump left office in January, the Department of Health and Human Services finalized a rule allowing agencies that receive federal grants to legally discriminate against LGBTQIA+ people.

The Trump administration's guidance, citing the Religious Freedom Restoration Act, reversed an Obama-era policy prohibiting agencies from discriminating on the basis of sex, sexual orientation, and gender identity. According to the final rule published in the Federal Register, nondiscrimination protections for LGBTQ+ people and religious minorities violate the Religious Freedom Restoration Act.

But does religious affiliation influence people's views on gender identity and expression? We included a question in our survey asking respondents to select the faith if any, that they identify with. Here's what we learned:

Older generations are the most likely to identify with a religion - over three-quarters of the Silent Generation and Boomers do so (76%) compared with a little over two-thirds of Gen X (67%), and

Gen Y (68%). But close to one-half of Gen Z report that they are not religious at all, or follow a non-mainstream faith (48%). Those most likely to identify with a non-Judo-Christian faith¹³ are Gen Y, at 10 percent, while Judeo-Christian faiths¹⁴ dominate overall.

Among Judeo-Christian respondents, 41 percent identify as Catholic, 15% percent as Baptist, and 12 percent as Protestant. Seven percent of respondents in this group identify as Jewish. Among non-Judeo-Christian faiths, just over one-half

identify as Muslim (51%), 29 percent as Buddhist, and one-fifth as Hindu (20%). Among those who are non-religious or identify with other traditions, slightly over one-third prefer not to say (34%), 27 percent listed other religions, one-fifth are agnostic (20%) and 18 percent are Atheists.

Respondents who follow Judeo-Christian faiths are about equally as likely to consider themselves a Democrat (39%) or a Republican (38%). However, among those who identify with non-Judeo-Christian

religions, 3 in 5 consider themselves Democrats (62%) and just 12 percent as Republicans. Respondents who are not religious are about twice as likely to consider themselves Democrat (39%) than Republican (19%).

In response to the statement that a person is either a man or a woman and nothing in between, two-thirds of all respondents who identify with a faith strongly or somewhat agree (66%), in contrast with less than one-half of those who are non-religious (46%). But ambivalence around a

person's sex assigned at birth versus their identity perhaps informs responses to the statement that gender is a spectrum. Approaching three-quarters of respondents who identify with a non-Judeo-Christian faith agree (72%), compared with just over one-half of those who are not religious (53%), and just under one-half of all respondents who identify with a Judeo-Christian faith (49%).

When it comes to contemporary concepts of gender, 3 in 5 respondents who identify with non-Judeo-

Christian religions agree that traditional roles and binary labels are outdated, while those who follow Judeo-Christian religions are approaching being split on the issue: 43 percent agree, but 35 percent disagree. The idea of giving a Creatable World™ doll to a child is a no less divisive issue: just under one-half of those who follow a Judeo-Christian faith would consider doing so (49%) but those from non-Judeo-Christian faiths are more comfortable with the idea: about one-fifth more would do so (69%).

Today, support for gender-neutral restrooms in public places is weakest among respondents who identify with Judeo-Christian faiths, with just one-third agreeing (33%). But among respondents who identify with non-Judeo-Christian faiths, a majority agrees - 56 percent. But at 62 percent, respondents who identify with non-Judeo-Christian faiths, are more likely than others to agree that people will associate gender with stereotypical traits, products, and occupations much less in the future.

During his first 100 days in office, President Biden has said that he wants to pass the Equality Act, which would ban anti-LGBTQ+ discrimination across the board.

13. Non-Judeo-Christian faiths selected by respondents: Muslim, Buddhist, and Hindu

14. Judeo-Christian faiths selected by respondents: Anglican, Baptist, Catholic, Episcopalian, Evangelical, Jewish, Lutheran, Methodist, Mormon, Orthodox, Pentecostal, Plymouth Brethren, Presbyterian, Protestant, Quaker, and Reformed

QUESTION 16

Traditional Gender Roles and Binary Labels Are Outdated

The two youngest generations - Gen Z and Gen Y - are more likely than others to see gender roles and binary labels as outdated. One-half of Gen Z agree (50%) while generational agreement is highest among Millennials at 56 percent. Male and cisgender female parents with some college education are about equally likely to agree (52% and 51%, respectively). In contrast, the two oldest

generations - Boomers and Silents - are the least likely to agree - but equally likely to disagree, both at 43 percent. Regionally, the respondents who are more likely to agree live in the West (49%) and Northeast (48%). And, consistent with earlier results, approaching two-thirds of LGBTQIA+ respondents agree (63%) making them the cohort most likely to do so.

50% **Gen Z**
Strongly / Somewhat Agree
n = 420

56% **Gen Y**
Strongly / Somewhat Agree
n = 471

44% **Gen X**
Strongly / Somewhat Agree
n = 429

36% **Boomer**
Strongly / Somewhat Agree
n = 488

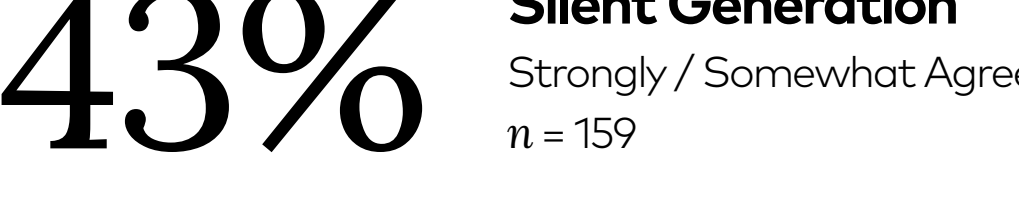
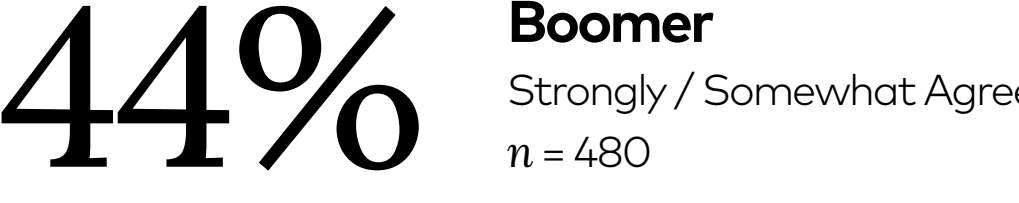
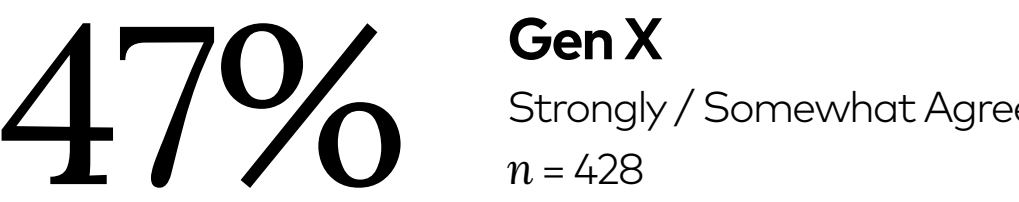
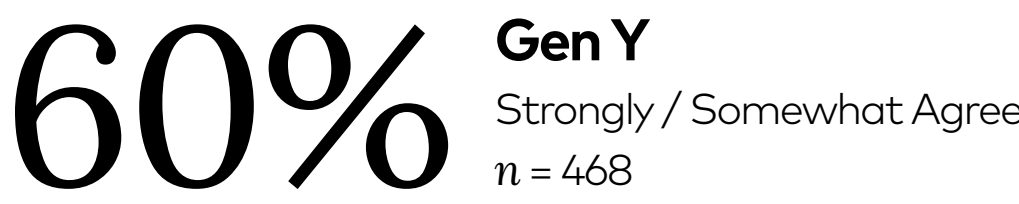
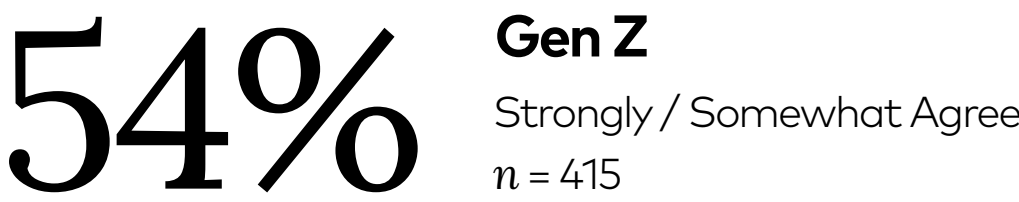
32% **Silent Generation**
Strongly / Somewhat Agree
n = 163

QUESTION 55

Ten Years from Now, We Will Associate Gender with Stereotypical Personality Traits, Products, and Occupations Much Less Than We Do Today

Just over one-half of all respondents agree that in a decade, we will associate gender with stereotypical personality traits, products, and occupations much less than we do today (51%), with respondents living in the West more likely to agree (55%) than those in other regions. LGBTQIA+ respondents are even more optimistic at 59 percent. Respondents identifying as female and male are equally likely to agree overall, but males who have attended college are more likely

to agree (55%) than those without any college (42%). Fifty-four percent of Gen Z agree, but the generational cohort most likely to do so are Gen Y, of whom 60 percent agree. And among racial and ethnic identities, 60 percent of respondents who describe themselves as Hispanic or Latino agree, more than any other racial group. Respondents who think of themselves as Republicans were less likely to agree (42%) than Independents (46%) and Democrats (62%).



In the survey’s final open-ended question, we asked respondents to explain why they selected their response to the preceding question. Just over one-half of responses were neutral in tone (51%), 26 percent were negative, and 21 were positive. Here are some of those responses:

“The world is changing, we are being more aware of the people that make up our population and are becoming more sensitive to those who fit outside of traditional ideals.”

Identifies as Female, Gen Y, Pennsylvania, Urban, Bachelor’s degree in college (4-year), White, Catholic

“I already see a change in the way products are marketed. Improvements and inclusivity are better in today’s society than in the past.”

Female, Gen Z, North Carolina, Urban, Some college but no degree, White, Agnostic

“We are shifting our understanding of the gender binary and younger generations are becoming more open to that. This will grow as time goes on.”

Female, Gen Z, New York, Suburban, Some college but no degree, Black/African American, Atheist

“There is more awareness about the subject that stems from the younger generation (Millennials and Gen Z), so when those generations become parents, their kids will grow up with those same values.”

Female, Gen Z, Virginia, Suburban, Some college but no degree, White, Spiritual

Positive
Negative

“People were created male and female only, and that will never change regardless of the brainwashing performed in schools and media.”

Male, Boomer, Alabama, Rural, Bachelor’s degree in college (4-year), White, Protestant

“Gender is a biological fact, any perceived changes are actually the result of cultural learning.”


Male, Boomer, Arizona, Suburban, Associate degree in college (2-year), White, Not religious

“Wild thinking. A woman will never measure up to a man in business. Men are rational, women emotional. That will never change the way situations would be handled.”

Male, Boomer, Florida, Suburban, Bachelor’s degree in college (4-year), White, Jewish

“I’m a historian by profession. Binary gender assignments have not always been standard in society. Renaissance and Medieval European conceptions of gender were more fluid, like a gradient. So, we are currently in a phase in history where we are cycling back to this concept. It’s not new. But that doesn’t mean that we won’t have cultural associations with gender (or gender types). It’s human to try to categorize.”

Female, Gen X, Pennsylvania, Suburban, Doctoral degree, White, Orthodox



FOLX: The First Digital Healthcare Platform for the Queer and Trans Community

LGBTQIA+ people are especially vulnerable to discrimination in health care, from humiliation and harassment to denial of necessary medical care and, as a result, are more likely to delay or forgo medical care - which increases their risk of further physical and mental health conditions like depression, cancer, and chronic diseases.

According to a 2018 study, 18 percent of LGBTQIA+ people reported avoiding medical treatment out of fear of discrimination,¹⁵ while an older study found that more than 50% of transgender individuals reported having to explain certain aspects of transgender-specific care to their medical providers.¹⁶

Launching in 2021, FOLX (pronounced "folks") is the first telehealth platform for the queer and trans community. With a focus on accessibility, trust, and convenience, FOLX wants to help the LGBTQIA+ feel respected and included in healthcare - rather than marginalized. A self-pay service, FOLX does not take insurance but aims to price its services lower than a deductible or copay. FOLX plans start at \$59 a month.

Visit: <https://folxhealth.com/>

15. Mirza, Shabab Ahmed, and Caitlin Rooney. "Discrimination Prevents LGBTQ People From Accessing Health Care." Center for American Progress, January 18, 2018. <https://www.americanprogress.org/issues/lgbtq-rights/news/2018/01/18/445130/discrimination-prevents-lgbtq-people-accessing-health-care/>.

16. National LGBTQ Task Force. "New Report Reveals Rampant Discrimination against Transgender People by Health Providers, High HIV Rates and Widespread Lack of Access to Necessary Care," October 13, 2010. <https://www.thetaskforce.org/new-report-reveals-rampant-discrimination-against-transgender-people-by-health-providers-high-hiv-rates-and-widespread-lack-of-access-to-necessary-care-2/>.

FOLX

Conclusion

Gen Z Is Not The Most Progressive Cohort

Bigeye's study results challenge the common perception that the youngest generation, Gen Z, are uniformly liberal in their views about societal issues. While they are more supportive of nonbinary gender identity than the oldest generations and the most likely to be open to exploring different expressions of gender, adults aged 25-39 - the Millennial generation - consistently hold the most progressive opinions overall, especially college-educated parents in this cohort. Gen Y is more likely to be established financially, and thinking about their children's future.

Skepticism about Gendered Products Tempered by Broad Support among Males

One in every 5 female respondents in our study believe that gendered products don't benefit consumers at all, with older consumers and those reporting the lowest household incomes the most likely to be skeptical of brands' motivations. Among those who do support gender-specific versions

of products, respondents identifying as male are more likely than females to do so. Razors, vitamins, nutritional supplements, skincare products, and clothing remain gender-specific in the minds of a majority of US consumers.

Visibility and Empowerment Should Be Key Considerations for Marketers

With the global social unrest in 2020, it is perhaps not surprising to see significant numbers of consumers expecting more from brands than simply the fulfillment of functional needs - from supporting causes like diversity, equity, and inclusion to the Black Lives Matter movement. Overall, non-white respondents feel less well represented in advertising and commercials than their fellow Americans, with BIPOC¹⁷ females especially likely to feel underrepresented and less empowered in media depictions of gender roles. Marketers and advertisers need to pay close attention to these consumers' perspectives: In every year since 2013, minority births have exceeded white births, and a majority of Americans under 16 years old are non-

white. The Census Bureau estimates that non-white citizens will comprise the majority of the US population within the next 25 years.

The Future of Gender is Being Shaped Today

Generation Y still has decades of purchasing power ahead of them, so it will be interesting to see how their children, dubbed Generation Alpha, will respond to their parents' less rigid ideas about gender in relation to early education, toys, and games. Compared with the generations that preceded them, how differently will the Gen Alpha children who are playing with Cretable World™ dolls today fashion their world as adults?

Will the traditional binary of male plus female continue to be presented as the ideal in pop culture, fashion, and consumer product categories, as well as our passport to companionship, love, and personal fulfillment? We expect to see Gen Y and Gen Z's influence reflected in a more secular, progressive, and multicultural society.



“I think embracing diversity in terms of the models and their various cultures, sizes and body types appeals to people who are also diverse. I like to buy from businesses that don’t discriminate against who I am.”

FM, genderfluid, Gen Y, Northeast

“Start including more gender nonconforming models when presenting products. Stop arbitrarily marketing products as specifically ‘for men’ or ‘for women.’ Continue the steady progress towards inclusivity and diversity.”

RG, nonbinary, Gen Z, Midwest

“Gender nonconforming people might like clothes and accessories that are seen as masculine or feminine. They might like playing with dolls or monster trucks. They might like video games, they might like cooking, they might like makeup. It’s not the products themselves that need to change, it’s the marketing that says, ‘people who enjoy this product look or act a certain way.’”

RG, nonbinary, Gen Z, Midwest

“Brands that want to acquire and keep customers should show that they care about the community. If you want nonbinary and trans people to continue to buy from you, show them you care about who they are and what they are going through. Donate clothing to homeless LGBTQIA+ youth. Donate to Black trans women who are the most vulnerable and likely to be harassed and murdered. I would for sure buy from those companies whenever I could.”

AS, agender, Gen Z, West

Appendices

Q1 - What age range are you in?

18-24	(Generation Z)	21%
25-39	(Generation Y)	24%
40-55	(Generation X)	22%
56-74	(Boomer Generation)	25%
75+	(Silent Generation)	8%

Q3 - Which of the following best describes the area you live in?

Suburban	53%
Urban	26%
Rural	21%

Q4 - What sex were you assigned at birth?

Male	49.9%
Female	49.5%
Intersex	0.6%

Q5 - How do you describe your gender identity?

Male	49.0%
Female	48.9%
Non-binary	0.7%
Male-to-Female transgender (MTF)	0.5%
Female-to-Male transgender (FTM)	0.5%
I prefer not to say	0.4%
Other	0.2%

Q6 - Is your gender identity the same as the sex you were assigned at birth?

Yes	96%
No	3%
I prefer not to say	1%

Q10 - Which of the following best describes your current relationship status?

Married	50%
Single, never married	23%
Divorced	6%
Dating	6%
Widowed	4%
Domestic partnership	4%
Single, but cohabiting with a significant other	4%
Separated	1%
I prefer not to say	1%

Q11 - Are you a parent or guardian?

Yes	54%
No	46%

Q12 - How many children under the age of 18 live in your household? (Asked of parents only)

1 - 2	47%
None	45%
3 - 4	7%
5 or more	1%

n=1072

Q57 - Which of the following best describes how you identify? Please select one.

White or Caucasian	71%
Black or African American	13%
Asian or Pacific Islander	7%
Hispanic or Latino	7%
Multiracial or Biracial	1%
Native American or Alaskan Native	1%
A race/ethnicity not listed here	1%

Q59 - Did you vote in last month's election?

Yes	81%
No	16%
I prefer not to say	3%

Q60 - Generally speaking, do you usually think of yourself as a Republican, a Democrat, an Independent, or something else?

Democrat	40%
Republican	30%
Independent	22%
No preference	4%
I prefer not to say	3%
Other	1%

Q61 - What is the highest level of school you have completed or the highest degree you have received?

Less than high school degree	2%
High school graduate (high school diploma or equivalent including GED)	17%
Some college but no degree	19%
Associate degree in college (2-year)	11%
Bachelor's degree in college (4-year)	29%
Master's degree	17%
Doctoral degree	3%
Professional degree (JD, MD)	3%

Appendices

Q62 - Please indicate your entire household income in 2019 before taxes.

\$0 to \$14,999	4%
\$15,000 to \$24,999	6%
\$25,000 to \$49,999	19%
\$50,000 to \$79,999	19%
\$80,000 to \$99,999	10%
\$100,000 to \$149,999	20%
\$150,000 to \$199,999	11%
\$200,000 or more	10%

Q63 - Which of the following best describes your orientation?

Straight (Heterosexual)	86%
Bisexual	5%
Lesbian	2%
Gay	2%
I prefer not to say	2%
Asexual	1%
Not Sure / Questioning	1%

Q58 - Which of these best describes your present religion, if any?

Catholic	25.3%
Baptist	9.2%
Other	8.9%
Protestant	7.7%
Agnostic	6.8%
Atheist	6.0%
Jewish	4.1%
Lutheran	3.0%
Methodist	3.0%
Muslim	2.8%
Evangelical	2.6%
Presbyterian	2.3%
Buddhist	1.5%
Episcopalian	1.1%
Hindu	1.1%
Orthodox	1.0%
Pentecostal	0.9%
Anglican	0.5%
Mormon	0.5%
Quaker	0.2%
Reformed	0.2%
Plymouth Brethren	0.1%
I prefer not to say	11.2%

In which state do you currently reside?

South	39%
Alabama	1.7%
Arkansas	0.8%
Delaware	0.4%
D.C.	0.5%
Florida	8.2%
Georgia	3.6%
Kentucky	1.4%
Louisiana	1.0%
Maryland	1.7%
Mississippi	0.6%
North Carolina	3.6%
Oklahoma	1.3%
South Carolina	1.4%
Tennessee	2.0%
Texas	6.9%
Virginia	3.3%
Northeast	22%
Connecticut	1.5%
Maine	0.3%
Massachusetts	2.6%
New Hampshire	0.5%
New Jersey	3.1%
New York	8.4%
Pennsylvania	4.9%
Rhode Island	0.5%
Vermont	0.2%

West	20%
Alaska	0.2%
Arizona	1.8%
California	9.5%
Colorado	1.4%
Hawaii	0.5%
Idaho	0.5%
Montana	0.0%
Nevada	1.2%
New Mexico	0.2%
Oregon	1.3%
Utah	0.9%
Washington	2.2%
Midwest	20%
Illinois	3.4%
Indiana	1.9%
Iowa	0.6%
Kansas	0.6%
Michigan	3.7%
Minnesota	1.3%
Missouri	1.5%
Nebraska	0.7%
North Dakota	0.1%
Ohio	4.5%
South Dakota	0.3%

Sources

1. Human Rights Campaign. "Sexual Orientation and Gender Identity Definitions." HRC. Accessed January 13, 2021. <https://www.hrc.org/resources/sexual-orientation-and-gender-identity-terminology-and-definitions>.
2. Cisgender describes those respondents whose sex assigned at birth is consistent with their gender identity (i.e. a person assigned the sex "female" at birth who also identifies their gender identity as female)
3. CNN. "Trump's Reversal on Transgender Bathroom Directive: How We Got Here." CNN Digital, February 23, 2017. <https://www.cnn.com/2017/02/23/health/transgender-bathrooms-trump-q-and-a/index.html>.
4. interACT: Advocates for Intersex Youth. "What Is Intersex? Frequently Asked Questions." Accessed December 28, 2020. <https://interactadvocates.org/faq/>.
5. Gender dysphoria: The feeling of discomfort or distress that might occur in people whose gender identity differs from their sex assigned at birth or sex-related physical characteristics.
6. Erving Goffman, Gender Advertisements (Harper & Row, NY: Harper Colophon Books, 1976)
7. "Research: Women Are Better Leaders During a Crisis." Harvard Business Review, December 30, 2020. <https://hbr.org/2020/12/research-women-are-better-leaders-during-a-crisis>.
8. Christia Spears Brown, Parenting Beyond Pink & Blue (Random House, NY: Ten Speed Press, 2014)
9. Let Toys Be Toys. "Let Toys Be Toys." Accessed September 14, 2020. <http://lettoysbetoys.org.uk/>
10. Creatable World™ promotional video: <https://images-na.ssl-images-amazon.com/images/I/D16LidlZnES.mp4>
11. Anchor. "Kim Culmone: The Ultimate Designing Woman for Barbie and Mattel by The Playground Podcast • A Podcast on Anchor." Accessed January 11, 2021. <https://anchor.fm/the-playground-podcast/episodes/Kim-Culmone-The-Ultimate-Designing-Woman-for-Barbie-and-Mattel-eljtm2>
12. AFAB: Assigned Female at Birth
13. Non-Judeo-Christian faiths selected by respondents: Muslim, Buddhist, and Hindu
14. Judeo-Christian faiths selected by respondents: Anglican, Baptist, Catholic, Episcopalian, Evangelical, Jewish, Lutheran, Methodist, Mormon, Orthodox, Pentecostal, Plymouth Brethren, Presbyterian, Protestant, Quaker, and Reformed
15. Mirza, Shabab Ahmed, and Caitlin Rooney. "Discrimination Prevents LGBTQ People From Accessing Health Care." Center for American Progress, January 18, 2018. <https://www.americanprogress.org/issues/lgbtq-rights/news/2018/01/18/445130/discrimination-prevents-lgbtq-people-accessing-health-care/>.
16. National LGBTQ Task Force. "New Report Reveals Rampant Discrimination against Transgender People by Health Providers, High HIV Rates and Widespread Lack of Access to Necessary Care," October 13, 2010. <https://www.thetaskforce.org/new-report-reveals-rampant-discrimination-against-transgender-people-by-health-providers-high-hiv-rates-and-widespread-lack-of-access-to-necessary-care-2/>.
17. BIPOC: Black and Indigenous People of Color



bigeyeagency.com

A BIGEYE 2021 NATIONAL STUDY

TRANS

BEYOND THE BINARY

AMERICANS' ATTITUDES, LIFESTYLES, PURCHASING BEHAVIORS, AND THE
IMPLICATIONS FOR ADVERTISERS AND MARKETERS