



12th Annual LGBTQ Community Survey: Key findings, marketing insights and outreach

Thomas Roth, President, Community Marketing & Insights

David Paisley, Senior Research Director, Community Marketing & Insights

Thank you



Please take 2 minutes before leaving:



Session Evaluation

@LGBTQinsights

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A little bit about Tom, David and our firm

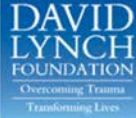


Khardongla Pass
18,380 ft
Ladakh, Jammu & Kashmir
Himalaya, India

With Scott and Leela at
Pt. Reyes National Seashore



C H A N G E B E G I N S W I T H I N



Healing Traumatic Stress and Raising Performance in At-risk Populations

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WELLNESS

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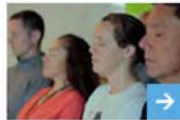
CHICAGO

INTERNATIONAL



TRANSCENDING HIV

WATCH VIDEO



VIDEO HIV/AIDS Webinar



VIDEO HIV/AIDS Webinar

Reducing stress and anxiety
and brightening the outlook of people
living with HIV/AIDS





- San Francisco-based, LGBTQ Owned/Operated company founded in 1992
- Serves corporate, university, organization and government institution clients throughout the USA, Canada, Europe, Asia and Australia
- 25 years of consumer research, strategic consulting, marketing planning, communications, and training services
- Dedicated research panel of 90,000+ LGBTQ consumers
- Online surveys, focus groups, virtual focus groups, in-depth interviews, intercepts and other methodologies



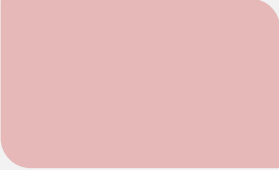
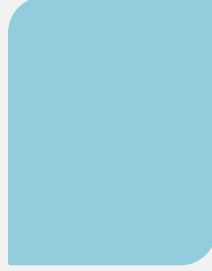
CMI's 70,000+ USA panel has significant numbers in every LGBTQ segment

- 20,000 lesbian and bisexual women
- 35,000 gay and bisexual men
- 5,000 transgender community members
- 8,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 20,000 representing LGBTQ communities of color
- 25,000 LGBTQ Millennials
- Participants in all 50 states with zip code-level geographic targeting capability
- 15,000 with a masters degree or higher
- 5,000 LGBTQ parents with a child under 18 living at home
- 12,000 legally married same-sex couples

To maximize client opportunity and ROI, we always explore the diversity within LGBTQ.

Some of CMI's LGBTQ Research, Education & Marketing Clients





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USA Report
 June 2018

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ABOUT CMI'S 12th ANNUAL LGBTQ COMMUNITY SURVEY

RESEARCH METHODOLOGY & ASSUMPTIONS

USA Report

- Completes n=18,743 participants
- All 50 states represented
 - 13% from CMI panel
 - 87% from 201 participating LGBTQ media and organization partners

Global Participation in Research

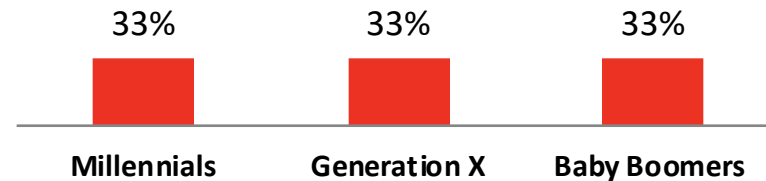
- n=40,460 participants
- From 151 countries

Results representational of LGBTQ community members who interact with LGBTQ media, events and organizations. This report is designed to help inform organizations that outreach to the community through LGBTQ media, events, and sponsorships.

Results Weighted by Identity

Gay & Bisexual Men	46%
Lesbian & Bisexual Women	46%
Gender-Expansive	8%

Results Weighted by Generation



FIELDLED IN ENGLISH, SPANISH, FRENCH AND HUNGARIAN

Percentages may not add up to 100% in some places due to rounding or multiple selections allowed.

CMI's 12th ANNUAL LGBTQ COMMUNITY SURVEY • RESEARCH PARTNERS

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Respondents were referred from the following LGBTQ research partners (media, events and organizations).

- !! Omg Blog !!
- A&U Magazine
- Adelante Magazine
- Atlanta Pride Committee
- Austin LGBTQ Chamber of Commerce
- Autostraddle
- Baltimore OUTloud
- Bay Area Reporter / BAR Media Inc
- Bay Windows
- Bear World Media
- BOI magazine
- Boston Pride
- Boy Culture
- BRO (The Bro App)
- Camara de Comerciantes LGBTQ de Colombia
- Cámara de Comercio i Negocios LGBTQ de Uruguay
- Camp Magazine
- Celebration Theatre
- Center For Black Equity
- CenterLink: The Community of LGBTQ Center
- CGLCC
- Chicagopride.com
- Circle of Voices Inc.
- Compete Magazine/Media Out Loud
- DailyXtra.com
- Dallas Voice | OUT North Texas
- Damron
- DC Black Pride
- DC Center for the LGBTQ Community, The
- DecorHomme
- Delta Foundation of Pittsburgh
- Desert Business Association
- Diversity Rules Magazine
- Dopes on the Road
- EnGAYged Weddings, Inc.
- Equally Wed
- Erie Gay News
- Fantasia Fair
- Fayetteville Black Pride
- Fenuxe Magazine
- First Friday Breakfast Club
- Focus Mid-South Magazine
- Fugues
- Fun Travel Guides
- Gatekeeper's Collective (TGC), The
- Gay City News
- Gay Pop Buzz
- Gay San Diego
- Gay to Z Directory
- Gayborhood
- GayCalgary
- GayCities
- GayDesertGuide.LGBT
- Gayly, The
- Gays With Kids
- GayTucson.com
- Gayvan.com Travel Marketing
- GBMNews
- GED Magazine
- Georgia Voice
- G-List, The
- GLO Center, The
- GoGUIDE Magazine
- Golden Gate Business Association
- Goliath Atlanta Magazine
- GPSGAY
- GRAB Magazine
- Greater Fort Lauderdale LGBTQ Chamber - GFLGCC
- Greg in Hollywood
- Grindr
- GSBA / Travel Gay Seattle
- GSHRadio
- Guide Arc enciel Quebec Rainbow Guide
- Harlem Pride
- Harlem2020
- Hayden's List
- He Said Magazine
- Hep
- HER
- Hornet Gay Social Network
- Hotspots Media Group
- Hudson Valley LGBTQ Community Center
- HUGS Movement
- Humen Media Hungary
- ImageOut - The Rochester LGBTQ Film Festival
- In the Life Atlanta
- Indy Pride, Inc.
- Infolette de Fugues
- Inside Out LGBTQ Film Festival
- Integrity USA, The Episcopal Rainbow
- Joe.My.God
- Kennethinthe212
- Kentucky Black Pride
- Las Vegas PRIDE
- Lavender Magazine
- Lesbian News
- Lesbian.com
- LGBTQ Community Center of the Desert, The
- LGBT+ Center Orlando, Inc., The
- LGBTQ Nation
- Lihnk
- LocalGayBusiness International
- LOOP Magazine
- Los Angeles Blade
- Love Inc. Magazine
- Magic City Acceptance Center
- MEGA Personalities
- Metro Weekly
- Metrosource
- Miami Dade Gay & Lesbian Chamber of Commerce
- Milwaukee LGBTQ Center
- misterb&b
- Montrose Center, The
- Montrose Star
- Moovz
- My Gay Houston
- Mystiq Boutiq
- NAGLREP - The National Association of Gay & Lesbian
- Real Estate Professionals
- Nashville LGBTQ Chamber
- Nashville Pride
- NE3Music (A Division of NE3, Inc.)
- New Leaf North America
- New Orleans Advocates for GLBT Elders (NOAGE)
- Northern Colorado Equality
- ONE Community
- One Iowa
- orgullolgbt.co
- Our Lives magazine
- Out & About Nashville, Inc.
- Out In Jersey Magazine
- Out Professionals
- OutClique
- OutSmart Media Company/OutSmart Magazine
- OutWithRyan.com
- Outword
- Outword California
- PASSPORT Magazine
- PeachATL Magazine
- Pink Banana Media
- Pink Spots/Rhineaux Media Corp.
- Pop Luck Club
- POZ
- Pride Guides®, The
- Pride Source Media Group
- PrideWire
- Pridezillas LLC
- Princess Janae Place
- Project Q Atlanta
- Provincetown Business Guild, The
- Q Magazine Australia
- Q Magazine Key West
- Q VIRGINIA
- Q Voice News
- QDoc: Portland Queer Documentary Film Festival
- QLife
- QNotes / goqnotes.com
- QSaltLake Magazine
- Queerty
- Rage Monthly Magazine
- Rainbow 411
- Rainbow Chamber Silicon Valley
- Rainbow Times, The
- Reaching Out MBA Inc.
- Sacramento LGBTQ Community Center
- San Antonio LGBTQ Chamber of Commerce
- San Diego LGBTQ Pride
- San Francisco Bay Times / "Betty's List"
- SAVE
- Seasons of Pride
- Seattle Lesbian, The
- Smart + Strong
- SOULE
- South Carolina Black Pride
- South Florida Gay News
- Southeast Alaska LGBTQ Alliance
- Southern Comfort Conference
- Spartacus
- Springs Equality
- Squirt.org
- St Pete Pride
- Standard Magazine, The
- Stonewall Alliance of Chico
- STRAIGHT Magazine
- SunServe
- SWERV Magazine
- Tagg Magazine
- therepubliq
- TomOnTour
- Towleroad
- Triangle Community Center
- TriVersity
- TwinCitiesGayScene.com
- UCHAPS
- VIP Media Group
- Washington Blade
- Watermark Publishing Group
- Whistler Pride and Ski Festival | GayWhistler
- Windy City Times / Windy City Media Group
- Wisconsin Gazette
- Wisconsin LGBTQ Chamber of Commerce
- Worcester Pride

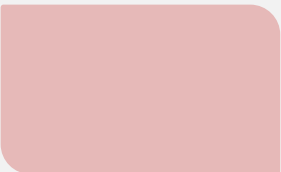
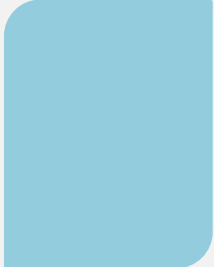
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LGBTQ Research Key Findings & Observations



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**Impact of
 Outreach
 to the LGBTQ
 Community**

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Among All LGBTQ Participants



“I fear there will be a roll back of recent LGBTQ equality gains in the coming year.”



76% Agree
16% Neutral
8% Disagree

Base: All LGBTQ n=18,532

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Among All LGBTQ Participants



“I tend to support companies that market to and support the LGBTQ community.”



78% Agree
20% Neutral
2% Disagree

Base: All LGBTQ n=18,548

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Among All LGBTQ Participants



“Companies that support LGBTQ equality will get more of my business this year.”

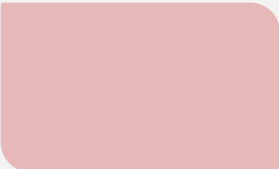
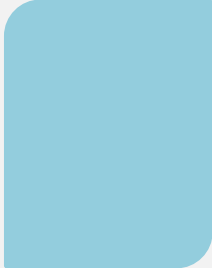


76% Agree
22% Neutral
2% Disagree

Base: All LGBTQ n=18,531

Corporations cannot sit back and assume that the LGBTQ community will notice their support. They need to actively let the community know through advertising, public relations, and social media.

How have you learned about a company's LGBTQ-inclusive outreach, employment practices, or LGBTQ-supportive political stance? (Please mark all that apply.)	USA ALL LGBTQ
Advertisement in the LGBTQ media	49%
Article or news story in the media	47%
Sponsorship of LGBTQ charity events or organizations	41%
LGBTQ-inclusive ads in the mainstream media	40%
From an LGBTQ friend	36%
From Facebook or other social media	35%
HRC Corporate Equality Index score	32%
From a blogger or influencer posting	16%
From a straight friend	6%
From family	5%



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**How Corporations
 Fail in Their LGBTQ
 Outreach
 Approaches**

Outreach to the Transgender/Gender-expansive Community

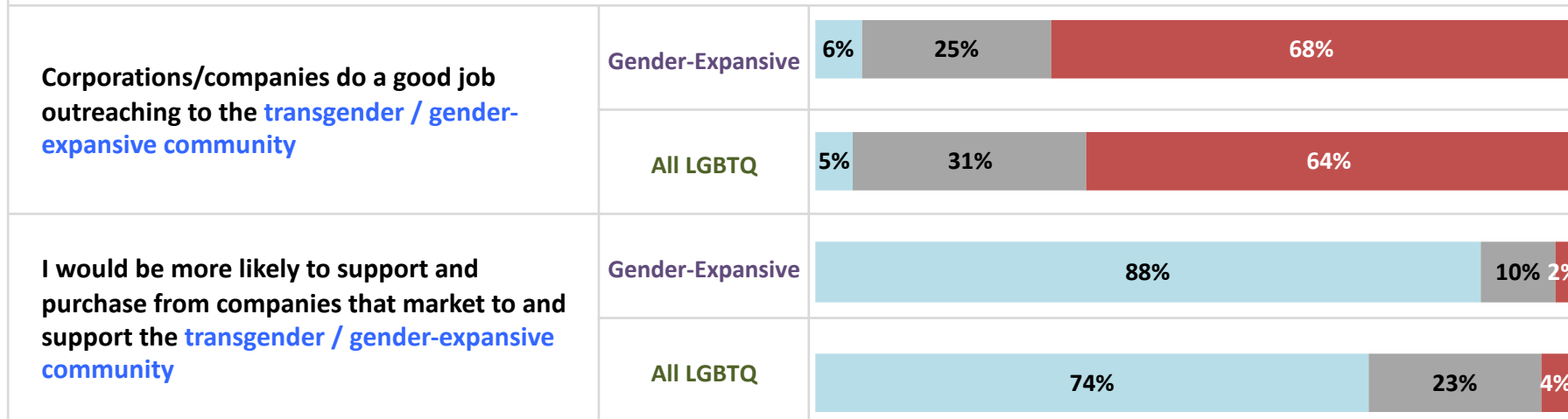
Do you agree or disagree with these statements?



● Agree

● Neutral

● Disagree



Base: Varies

Outreach to the Lesbian Community

Do you agree or disagree with these statements? Please read the text carefully.



● Agree

● Neutral

● Disagree

<p>Corporations/companies do a good job outreaching to the lesbian community</p>	<p>Among Lesbian Participants</p>	<table border="1"> <tr> <th>Response</th> <th>Percentage</th> </tr> <tr> <td>Agree</td> <td>5%</td> </tr> <tr> <td>Neutral</td> <td>37%</td> </tr> <tr> <td>Disagree</td> <td>58%</td> </tr> </table>	Response	Percentage	Agree	5%	Neutral	37%	Disagree	58%
Response	Percentage									
Agree	5%									
Neutral	37%									
Disagree	58%									
<p>I would be more likely to support and purchase from companies that market to and support the lesbian community</p>	<p>Among Lesbian Participants</p>	<table border="1"> <tr> <th>Response</th> <th>Percentage</th> </tr> <tr> <td>Agree</td> <td>90%</td> </tr> <tr> <td>Neutral</td> <td>9%</td> </tr> <tr> <td>Disagree</td> <td>1%</td> </tr> </table>	Response	Percentage	Agree	90%	Neutral	9%	Disagree	1%
Response	Percentage									
Agree	90%									
Neutral	9%									
Disagree	1%									

Base: Varies

Outreach to the LGBTQ African American Community

*Asked to African American
LGBTQ participants*



Base: Varies

**Corporate America does a good job outreaching to the
LGBTQ African American / Black Community**

Agree 4%

Neutral 19%

Disagree 77%

**I feel more positive towards companies that include
African American / Black imagery in their outreach communications**

Agree 73%

Neutral 21%

Disagree 7%

**I would be more likely to support and purchase from companies that
market to and support the LGBTQ Black / African American community**

Agree 79%

Neutral 17%

Disagree 4%

Outreach to the LGBTQ Latino/Latina Community

*Asked to Latino
LGBTQ participants*



Base: Varies

**Corporate America does a good job outreaching to the
LGBTQ Latino / Hispanic Community**

Agree 8% Neutral 37% Disagree 55%

**I feel more positive towards companies that include
Latino / Hispanic imagery in their outreach communications**

Agree 67% Neutral 28% Disagree 5%

**I would be more likely to support and purchase from companies that
market to and support the LGBTQ Latino / Hispanic community**

Agree 79% Neutral 19% Disagree 2%

Support for the LGBTQ Asian-American Community

*Asked to Asian
LGBTQ participants*



**Corporate America does a good job outreaching to the
LGBTQ Asian Community**

Agree 3% Neutral 18% Disagree 80%

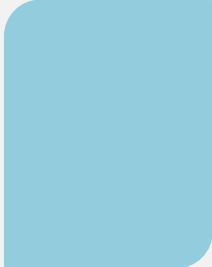
**I feel more positive towards companies that include
Asian imagery in their outreach communications**

Agree 63% Neutral 29% Disagree 8%

**I would be more likely to support and purchase from companies that
market to and support the LGBTQ Asian community**

Agree 74% Neutral 23% Disagree 3%

Base: Varies



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**Family
 Life**

Relationship Status

Which of the following best describes your current relationship status? (Please mark all that apply)	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender-Expansive
Single or dating not living with partner	53%	37%	48%
In a relationship and living with partner (no legal status)	17%	18%	15%
Legally Married	26%	39%	31%
Civil union or registered domestic partner	2%	3%	3%
Engaged	2%	3%	3%

You indicated that you are legally married. How long ago did you get married?

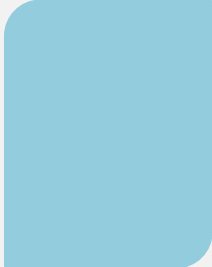
< 1 Year	12%
1-2 Years Ago	24%
3-5 Years Ago	33%
6+ Years Ago	31%
Prefer not to answer	0.17%

Parents & Children Among LGBTQ Community Survey Participants

Do you have children? (Please mark all that apply)	Gay & Bisexual Men			Lesbians & Bisexual Women			Gender-Expansive		
	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+
Yes, children under age 18 Living at home or not	3%	8%	3%	12%	30%	5%	7%	20%	7%
Yes, children over age 18.	0%	6%	19%	0%	16%	34%	0%	13%	51%

Parents & Children Among LGBTQ Community Survey Participants

Do you have children? (Please mark all that apply)	Gay & Bisexual Men			Lesbians & Bisexual Women			Gender-Expansive		
	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+
Yes, children under age 18 Living at home or not	3%	8%	3%	12%	30%	5%	7%	20%	7%
Yes, children over age 18.	0%	6%	19%	0%	16%	34%	0%	13%	51%



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**LGBTQ
 Health**

Understanding LGBTQ Health Concerns (to demonstrate nuance among gender and generation)

Which of the following health and injury issues are you most concerned about for yourself, personally? Please limit your choices to those that are of most concern to you.	USA ALL LGBTQ
Depression / mental health concerns	46%
Body Weight	45%
Losing or not having access to health insurance	39%
Cancer	31%
Heart disease	24%
Alzheimer's disease	20%
Diabetes	19%

HIV/AIDS	16%
Death or injury from gun violence	15%
Sexually transmitted diseases	15%
Death or injury from car accident	13%
Stroke	13%
Alcohol use	11%
Asthma or respiratory diseases	10%
Tobacco use / smoking	8%
Influenza and pneumonia	5%
Kidney disease	5%
Liver diseases including Hepatitis B or C	4%
Death or injury from sports or athletic activity	3%
None of the above	7%

Base: All LGBTQ n=18,743

Understanding LGBTQ Health Concerns by Generation

Which of the following health and injury issues are you most concerned about for yourself, personally? Please limit your choices to those that are of most concern to you.	LGBTQ Millennials	LGBTQ Generation X	LGBTQ Baby Boomers
Depression / mental health concerns	62%	43%	31%
Body weight	42%	49%	43%
Losing or not having access to health insurance	38%	40%	39%
Cancer	29%	32%	32%
Sexually transmitted diseases	23%	14%	8%
HIV/AIDS	18%	16%	14%
Stroke	6%	12%	21%

Responses with less than 10% for all generations are not included
 Base: Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

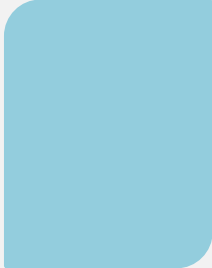
Understanding LGBTQ Health Concerns by Gender

Which of the following health and injury issues are you most concerned about for yourself, personally? Please limit your choices to those that are of most concern to you.	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive
Body weight	46%	44%	40%
Depression / mental health concerns	40%	49%	60%
Losing or not having access to health insurance	34%	42%	51%
HIV/AIDS	30%	2%	13%
Sexually transmitted diseases	25%	5%	15%

Responses with less than 10% for all generations are not included

Base: Cisgender Gay & Bisexual Men n=12,934; Cisgender Lesbian & Bisexual Women n=4,205;

Gender-expansive n=1,604





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**LGBTQ Social
 and Political
 Concerns**



USA vs. Canada, LGBTQ-friendly Perceptions of Country

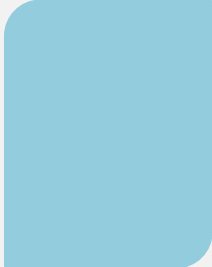
Do you agree or disagree with these statements?		 USA	Canada 
		2018	2018
I live in an LGBTQ-friendly city, town, or community.	Strongly Agree	41%	47%
	Somewhat Agree	43%	43%
	Somewhat Disagree	12%	8%
	Strongly Disagree	4%	2%
I live in an LGBTQ-friendly state or province.	Strongly Agree	32%	47%
	Somewhat Agree	38%	46%
	Somewhat Disagree	20%	7%
	Strongly Disagree	11%	1%
I live in an LGBTQ-friendly country.	Strongly Agree	5%	62%
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USA vs. Canada, LGBTQ-friendly Perceptions of Country

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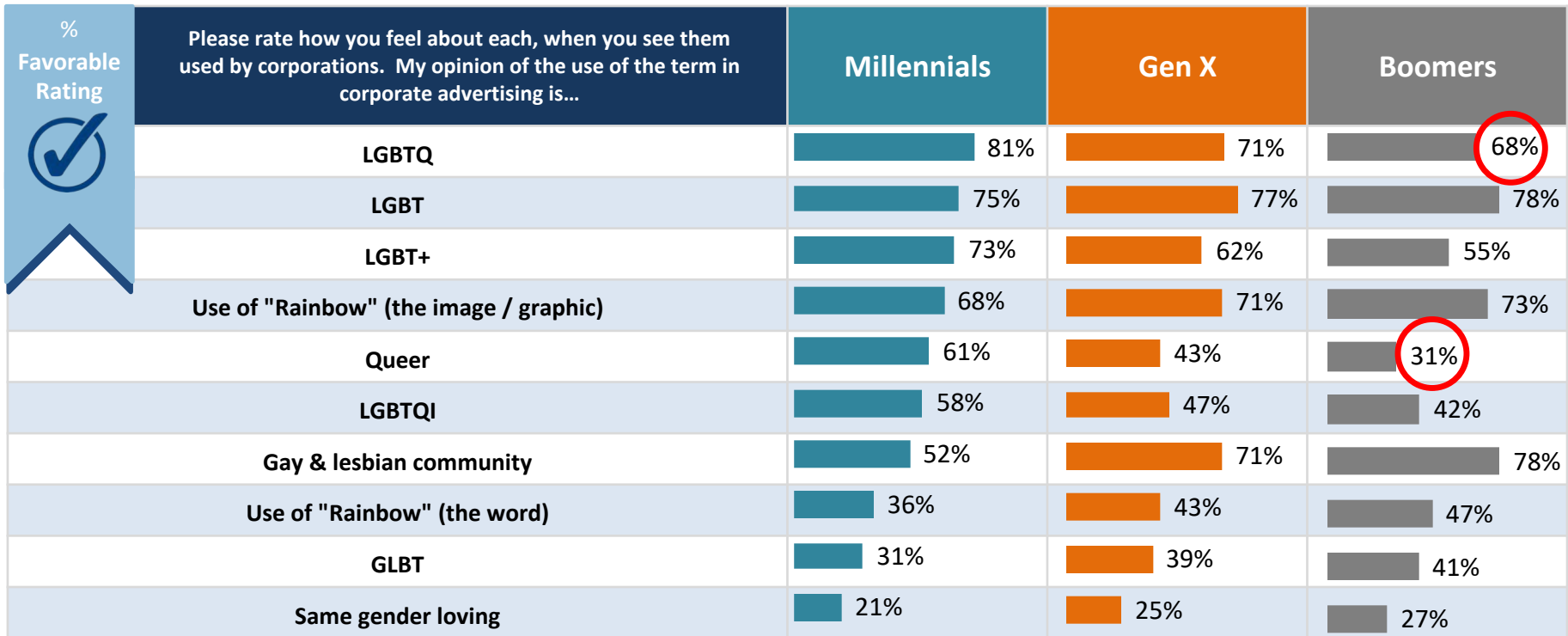
Terminology

2018 Favorability of Terms by Generation: LGBT and LGBTQ are virtually equally favorable. LGBTQ is now firmly in the positive compared to previous years. LGBT+ is gaining in popularity, and now perceived favorably across all generations. All three of these terms can be used without negative risk. Note that same-gender loving tends to be used more in the African American community, and has a 46% positive rating.

% Favorable Rating	Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...	Generation		
		Millennials	Gen X	Boomers
	LGBTQ	81%	71%	68%
	LGBT	75%	77%	78%
	LGBT+	73%	62%	55%
	Use of "Rainbow" (the image / graphic)	68%	71%	73%
	Queer	61%	43%	31%
	LGBTQI	58%	47%	42%
	Gay & lesbian community	52%	71%	78%
	Use of "Rainbow" (the word)	36%	43%	47%
	GLBT	31%	39%	41%
	Same gender loving	21%	25%	27%


Base: Varies

2018 Favorability of Terms by Generation: LGBT and LGBTQ are virtually equally favorable. LGBTQ is now firmly in the positive compared to previous years. LGBT+ is gaining in popularity, and now perceived favorably across all generations. All three of these terms can be used without negative risk. Note that same-gender loving tends to be used more in the African American community, and has a 46% positive rating.



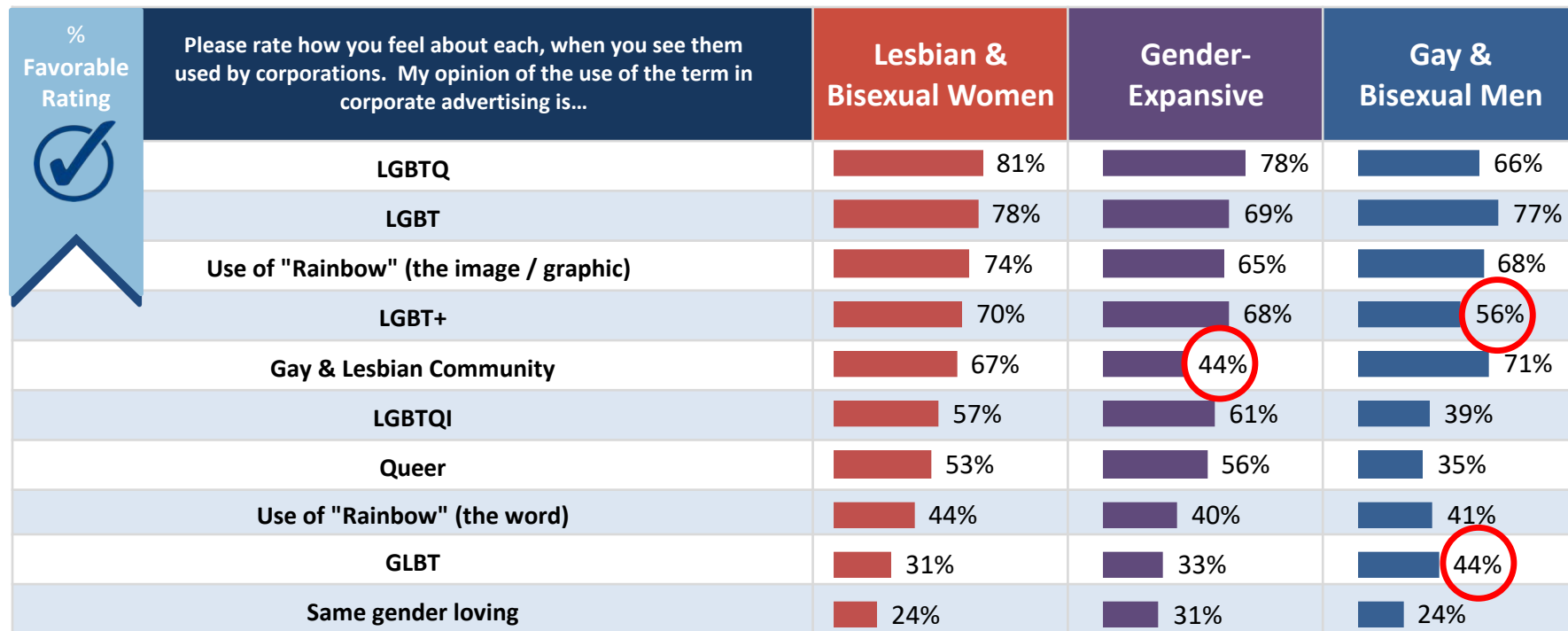
Base: Varies

2018 Favorability of Terms by Gender: By gender, there are some more clear distinctions. LGBT is favored by gay and bisexual men over LGBTQ. Queer has clear negatives for most men, at least when used in the context of corporate communications. The gender-expansive community favors LGBTQ. Note: GLBT is now perceived unfavorably across all demographics, even among men.

% Favorable Rating	Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...	Lesbian & Bisexual Women	Gender-Expansive	Gay & Bisexual Men
	LGBTQ	81%	78%	66%
	LGBT	78%	69%	77%
	Use of "Rainbow" (the image / graphic)	74%	65%	68%
	LGBT+	70%	68%	56%
	Gay & Lesbian Community	67%	44%	71%
	LGBTQI	57%	61%	39%
	Queer	53%	56%	35%
	Use of "Rainbow" (the word)	44%	40%	41%
	GLBT	31%	33%	44%
	Same gender loving	24%	31%	24%

Base: Varies

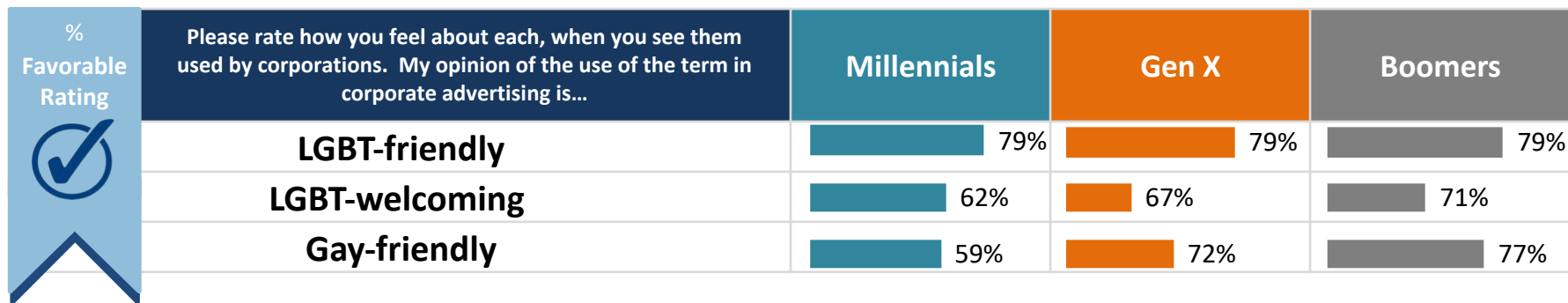
2018 Favorability of Terms by Gender: By gender, there are some more clear distinctions. LGBT is favored by gay and bisexual men over LGBTQ. Queer has clear negatives for most men, at least when used in the context of corporate communications. The gender-expansive community favors LGBTQ. Note: GLBT is now perceived unfavorably across all demographics, even among men.



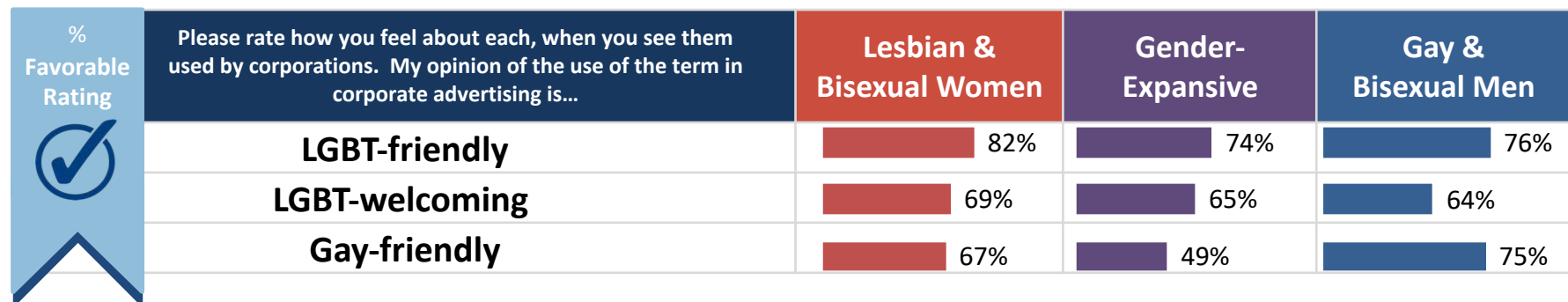
Base: Varies

Caution on “Gay-friendly”: Care needs to be taken when using terms such as “gay-friendly” and “gay neighborhood,” because these terms may no longer imply the “entire” community. Rephrasing to “LGBT-friendly” and “LGBTQ neighborhood” is more inclusive.

By Generation



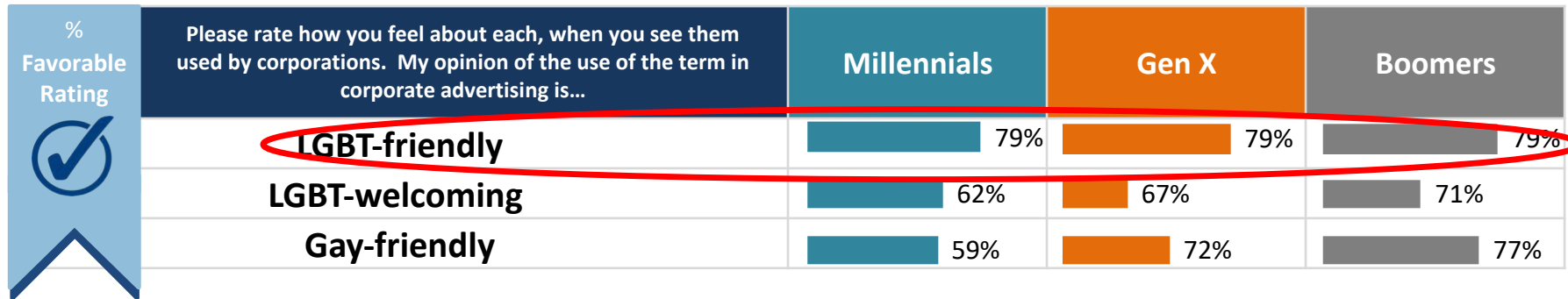
By Gender



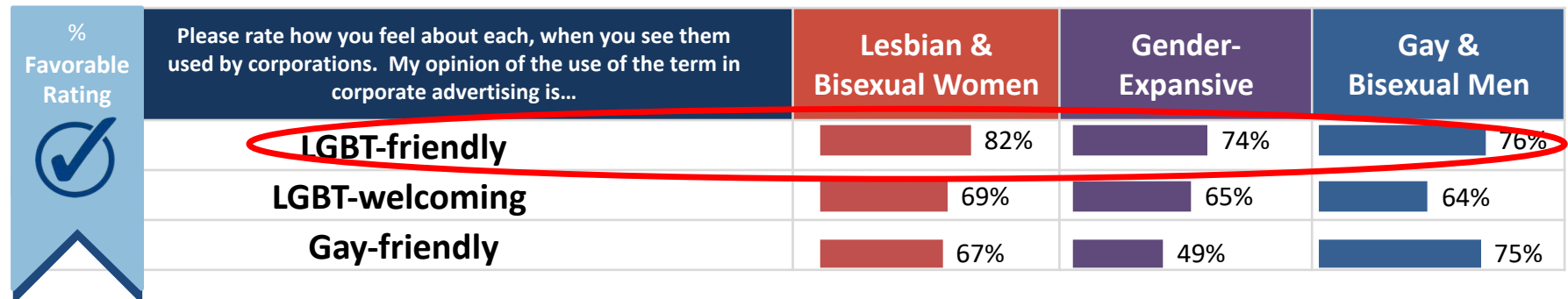
Base: Varies

Caution on “Gay-friendly”: Care needs to be taken when using terms such as “gay-friendly” and “gay neighborhood,” because these terms may no longer imply the “entire” community. Rephrasing to “LGBT-friendly” and “LGBTQ neighborhood” is more inclusive.

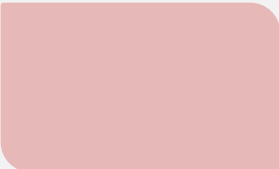
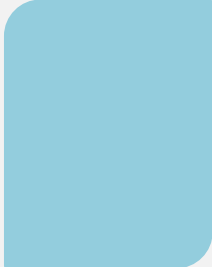
By Generation



By Gender



Base: Varies



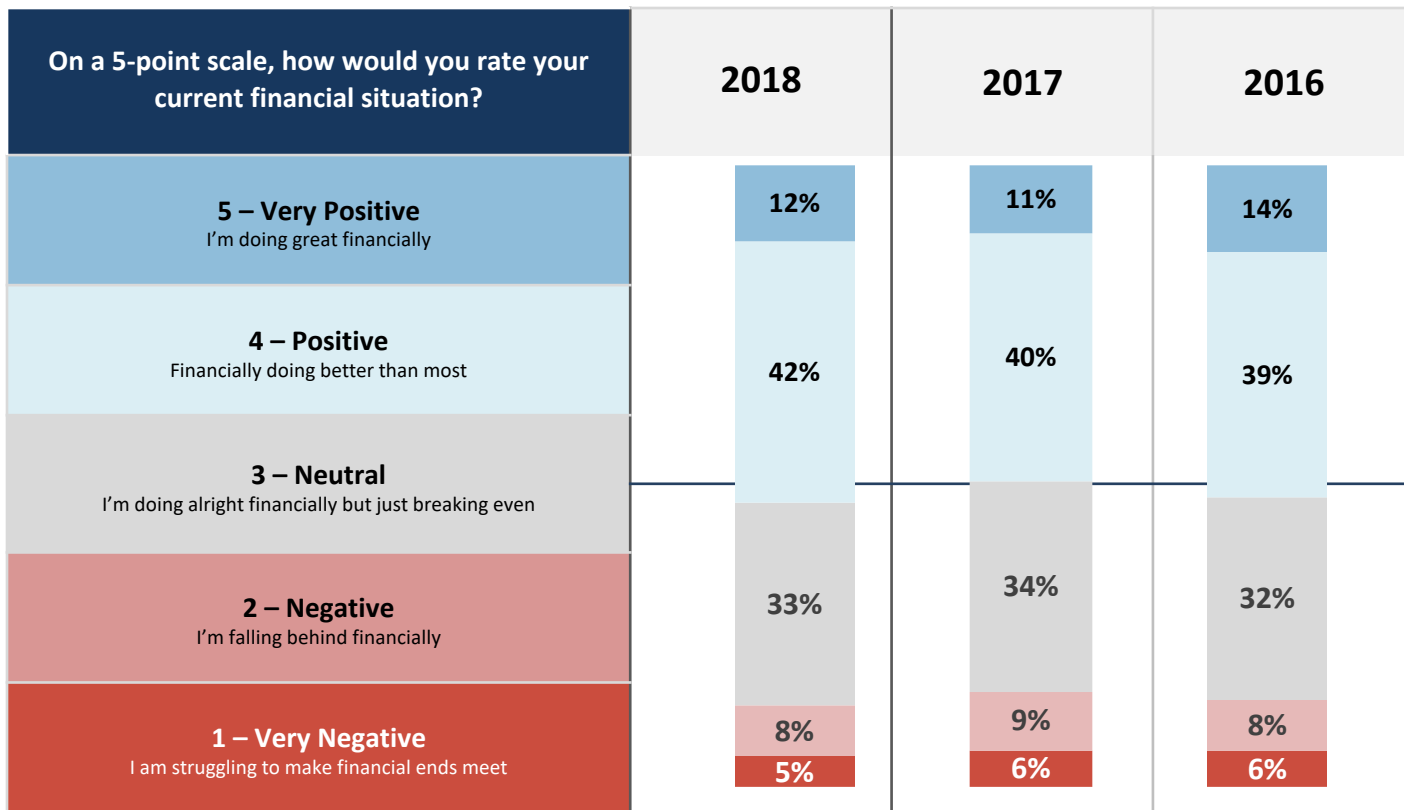
 **CMI Community Marketing & Insights**
 Leaders in LGBTQ Research since 1992

CMI's 12th Annual LGBTQ Community Survey[®]
USA Report • June 2018



**Economic
 Confidence and
 Purchasing**

LGBTQ Economic Outlook Has Not Significantly Changed Over The Past Three Years.



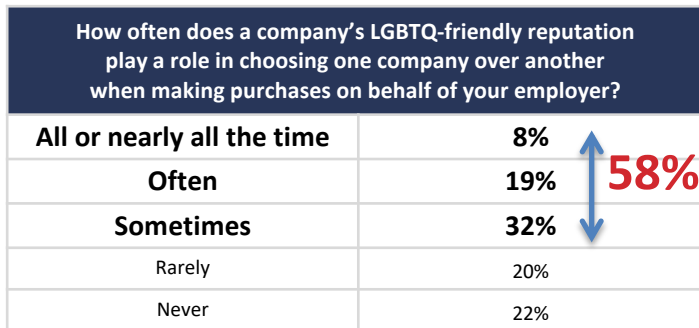
Base: 2018 n=18,743; 2017 n=17,420; 2016 n=13,558

Power of LGBTQ Business Spending

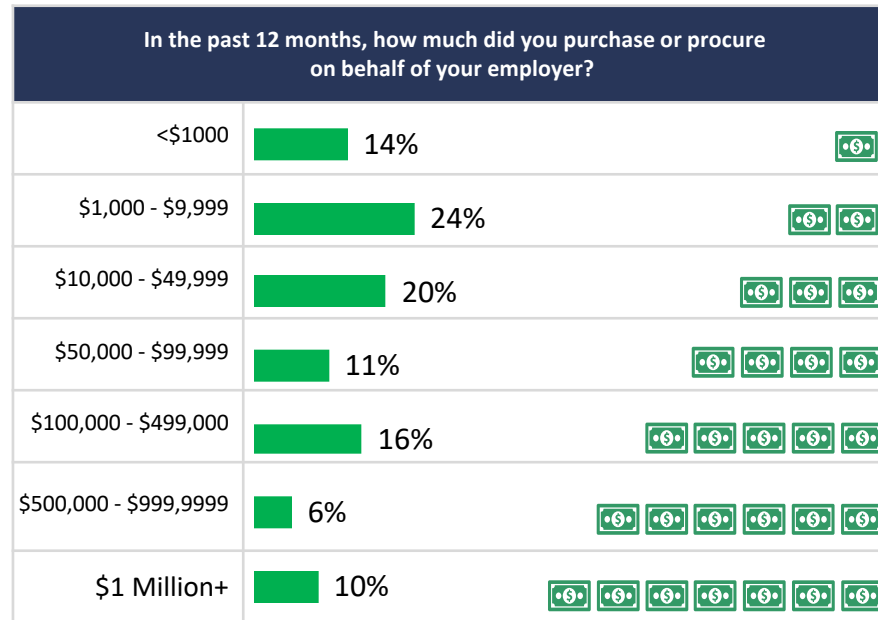
AMONG THOSE EMPLOYED OR BUSINESS OWNERS



AMONG BUDGET CONTROLLERS



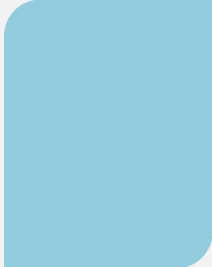
AMONG BUDGET CONTROLLERS



Brand Recall: Every year, CMI asks an unaided “write-in” recall question about brands that participants make a conscious decision to purchase from, because of their pro-LGBTQ policies or practices. In 2017, we saw Target, Apple, Starbucks, and Amazon retain their top four rankings. Note the success of some smaller brands for the lesbian and bisexual women and gender-expansive community members.

Over the past 12 months, which companies or brands have you made a conscious decision to purchase from because of their pro-LGBTQ policies or practices? You may write up to 10 companies.		
Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive
TARGET 29%	TARGET 35%	TARGET 42%
Apple 23%	Apple 12%	amazon 12%
amazon 19%	amazon 11%	STARBUCKS 12%
STARBUCKS 12%	STARBUCKS 11%	Apple 10%
macy's 8%	SUBARU 8%	LUSH FRESH HANDMADE COSMETICS 7%
American Airlines 8%	WILDFANG 5%	gc2b 4%
ABSOLUT. 8%	BEN & JERRY'S 5%	
DELTA 7%	macy's 4%	
Wells Fargo 6%	ABSOLUT. 4%	
Google 5%	Google 4%	
Marriott INTERNATIONAL 4%	THE HOME DEPOT 4%	
Levi's 4%	Campbell's 3%	
CHASE 4%	JCPenney 3%	
Hilton 4%	Wells Fargo 3%	

Base: Cisgender Gay & Bisexual Men n=4,840; Cisgender Lesbian & Bisexual Women n=1,782; Gender-expansive n=689



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**LGBTQ Sales &
Outreach Data
Information
Available...**

**Please
Download**

Example: LGBTQ Travel Purchases Over Past 12 Months By Gender And Generation

Have you (or you and your partner) purchased any of the following items during the past 12 months? (Please mark all that apply.)	Country	USA Gender Breakout			USA Generation Breakout		
	USA ALL LGBT	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive	Millennials	Generation X	Baby Boomers
Airplane ticket	63%	66%	63%	48%	66%	65%	59%
Night in a hotel or other paid accommodation	62%	65%	62%	49%	59%	67%	61%
Short vacation of 2 nights or less	43%	45%	44%	32%	45%	47%	38%
Long vacation of 5 nights or more	42%	46%	40%	27%	37%	43%	44%
Medium vacation of 3 or 4 nights	41%	45%	39%	29%	42%	44%	37%
Rental car	38%	43%	35%	24%	33%	43%	37%
Airbnb stay	25%	23%	28%	19%	38%	23%	14%
Cruise vacation	10%	12%	8%	6%	5%	11%	13%
None of the above	17%	16%	16%	28%	16%	15%	20%

Base: All LGBTQ n=18,743; Cisgender Gay & Bisexual Men n=12,934; Cisgender Lesbian & Bisexual Women n=4,205; Gender-expansive n=1,604; Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

LGBTQ Sales & Outreach Data Information Available...
Please Download Free Report at CommunityMarketingInc.com

Electronics
Alcohol
Beverages
Banking
Insurance

LGBTQ Media
Gen Pop Media
LGBTQ Events
Social Media

3

A few LGBTQ Research Case Studies



Greater Fort Lauderdale CVB: LGBTQ Segmentation

greater FORT LAUDERDALE
HELLO SUNNY

Welcoming the Transgender Traveler
A study for the Greater Fort Lauderdale Convention & Visitors Bureau

Produced By:
CMI Community Marketing & Insights
Community Marketing, Inc.

greater FORT LAUDERDALE
HELLO SUNNY

Where happy meets go happy.
See why Greater Fort Lauderdale is the #1 destination in Florida for the entire LGBT community at www.goflga.com

sunny.org/tlgb

@VisitLauderdale | #HELLOSUNNY

sunny.org/tlgb

Greater Fort Lauderdale CVB: LGBTQ Segmentation



Greater Fort Lauderdale CVB: LGBTQ Segmentation



greater FORT LAUDERDALE
HELLO SUNNY
sunny.org

**LGBTQ MILLENNIAL
TRAVEL TO
FORT LAUDERDALE**

CMI MARKET INTELLIGENCE REPORT
JANUARY 2017

Produced by:
CMI Community Marketing & Insights
Community Marketing, Inc.

Las Vegas CVA: LGBTQ Longitudinal Study 2004-2018



Case Study: Visit Philadelphia



- For **every \$1 invested** into LGBTQ marketing, Philadelphia yielded **\$153 ROI**.
- General market visitors average spend \$559. LGBTQ visitors average spend \$878.
- Unaware of LGBTQ ads: spend \$743
- Aware of ads: spend \$1,013.
- Became a “Top 10” LGBTQ destination.

Case Study: AARP



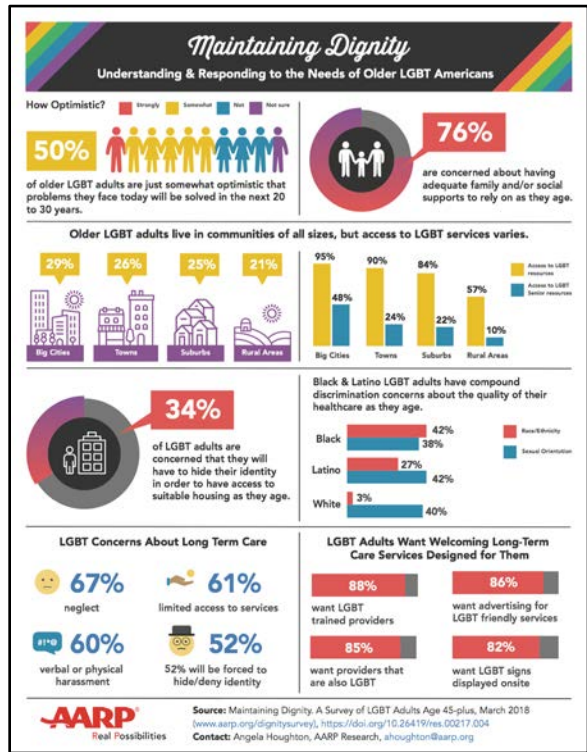
Maintaining Dignity

Understanding and Responding to the Challenges Facing Older LGBT Americans

An AARP survey of LGBT adults age 45-plus

Report dated March 2018

AARP RESEARCH | AARP.ORG/RESEARCH
<https://doi.org/10.26419/res.00217.001>

Maintaining Dignity

Understanding & Responding to the Needs of Older LGBT Americans

How Optimistic? ■ Strongly ■ Somewhat ■ Not ■ Not sure

50% of older LGBT adults are just somewhat optimistic that problems they face today will be solved in the next 20 to 30 years.

76% are concerned about having adequate family and/or social supports to rely on as they age.

Older LGBT adults live in communities of all sizes, but access to LGBT services varies.

Community Type	Access to LGBT Services	Access to LGBT Senior Resources
Big Cities	48%	95%
Towns	24%	90%
Suburbs	22%	84%
Rural Areas	10%	57%

29% Big Cities, 26% Towns, 25% Suburbs, 21% Rural Areas

34% of LGBT adults are concerned that they will have to hide their identity in order to have access to suitable housing as they age.

Black & Latino LGBT adults have compound discrimination concerns about the quality of their healthcare as they age.

Race/Ethnicity	Black	Latino	White
Black	42%	38%	3%
Latino	42%	27%	40%
White	3%	40%	3%

LGBT Concerns About Long Term Care

neglect	67%	limited access to services	61%
verbal or physical harassment	60%	52% will be forced to hide/deny identity	52%


LGBT Adults Want Welcoming Long-Term Care Services Designed for Them

want LGBT trained providers	88%	want advertising for LGBT friendly services	86%
want providers that are also LGBT	85%	want LGBT signs displayed onsite	82%

AARP Real Possibilities


Source: Maintaining Dignity. A Survey of LGBT Adults Age 45-plus, March 2018
www.aarp.org/dignitysurvey/, <https://doi.org/10.26419/res.00217.004>
 Contact: Angela Houghton, AARP Research, ahoughton@aarp.org

Case Study: Freddie Mac



The LGBT Community:
Buying and Renting Homes

Presented by: Community Marketing & Insights
May 2018



Case Study: New York Life

*Executive Summary Meeting
May 3, 2018*

New York Life: Recruiting LGBT Agents Research Initiative 2018

Produced by:  **CMI Community Marketing & Insights**
Community Marketing, Inc.



Case Study: Wilson Media Group/Gilead

WMG
Wilson Media Group, Inc.

**Gay and Bisexual Men's
Health and Media Study
2017 Results**

PREPARED BY:
 **CMI Community Marketing & Insights**
Community Marketing, Inc.



4

Follow Up & Stay Connected

Learn more about LGBTQ Marketing Opportunities:

Research reports for free download on CMI.info

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Community Marketing, Inc.

CMI's 12th Annual LGBTQ Community Survey®
USA Report
June 2018

Sponsored by **WELLS FARGO** In partnership with **Rivendell** the gay media company!

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**Annual LGBTQ Community Survey: Since 2007
40,000 Participants
In 151 countries**

CMI Community Marketing & Insights
Community Marketing, Inc.

22nd Annual LGBTQ Tourism & Hospitality Survey
U.S. Overview Report
November 2017

In partnership with **IGLTA**

Sponsored by **TOURISMA TORONTO** **Vegas**

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**Annual LGBTQ Tourism Study: Since 1994
7,500 Participants**

CMI Community Marketing & Insights
Community Marketing, Inc.

African American / Black LGBTQ Community Survey
in partnership with

CMI Community Marketing & Insights
Community Marketing, Inc.

Same-sex Weddings in 2016: A Review of CMI Research One Year After the Landmark

HELLO sunny
YOUR TRIP LIFESTYLE

CMI Community Marketing & Insights
Community Marketing, Inc. **nglcc**

CMI's 5th Survey on LGBT Business

CMI Community Marketing & Insights
Community Marketing, Inc.

1st China LGBTQ Community Survey®
In partnership with

Shanghai LGBT Professionals
上海同志商务

danlan **liquid**



OUT & EQUAL
WORKPLACE ADVOCATES





Join relevant professionals' organizations.



Travel



Real Estate

LGBTQ WEEK SM

June 17-21, 2019



**CMI's 12th Annual
Symposium on LGBTQ
Marketing & Advertising
June 20, 2019 @ Google NYC**

Educational Workshops & Corporate Training




Thomas Roth and David Paisley, leaders of the Community Marketing & Insights team, have developed and presented LGBTQ educational workshops and training sessions since 1993. With broad client services experience, as well as over two decades of conducting LGBTQ market research surveys and focus groups, Mr. Roth and Mr. Paisley speak from a level of experience that is unmatched today. CMIs workshops are customized for each presentation, and bring this lively, interactive and thought-provoking topic to any educational environment.

Mr. Roth and Mr. Paisley offer a range of 20 to 60-minute presentations and keynotes, all the way to 2 or 3-hour interactive workshops. We can produce both live and webinar/remote presentations.

**Follow up:
For links to download this
presentation, our reports, or for
opportunities to work together
please pass me a business card,
or email tom@CMI.info**

Please take 2 minutes before leaving:



Session Evaluation



CMI Community Marketing & Insights

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@LGBTInsights

*Community Marketing, Inc. is an NGLCC Certified
LGBTQ Owned Business Enterprise.*



LGBTQ Research Panel 2018

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with 25 years of dedicated experience conducting LGBTQ consumer surveys, focus groups, in-depth interviews, advisory boards, consulting services and training. We skillfully assist our clients with strategies, tactics and cost-effective plans based on research results and case study experience.

CMI's PANEL CONSISTS OF OVER 90,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



70,000
LGBTQ Panelists
in the USA



9,000
LGBTQ Panelists
in Canada
(English + French Speaking)



4,500
LGBTQ Panelists
in China



Capabilities in the
UK, Germany,
Australia, Mexico
and other countries



IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBT SEGMENT

20,000
Lesbian and
bisexual women



30,000
Gay and
bisexual men



5,000
Transgender
community
members



10,000
Bisexual
community
members



7,500 With an HHI
Over \$150,000



7,500 With an HHI
Below \$25,000



- ✓ Participants in all 50 states
- ✓ Zip code-level geographic targeting capability

Thousands of men living with HIV

Note: All health-related data is maintained independent of personally identifying information.



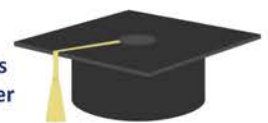
25,000
Representing
the LGBTQ
community
of color



25,000
LGBTQ
Millennials



12,000
With a master's
degree or higher



5,000
LGBTQ parents with
a child under 18
living at home



15,000
Legally married
same-sex couples



LGBTQ youth research
experience
(in partnership with an
institution and IRB approval)



LGBTQ Research and Corporate Training

Proud to serve these and other companies, organizations, universities, government institutions and researchers...

 TARGET	 Better Homes and Gardens REAL ESTATE	 WNBA	 Hallmark Cards	 DIRECTV	 WELLS FARGO
 GILEAD	 Johnson & Johnson	 HOLOGIC The Science of Sure	 RADIESSE A NATURAL LOOK THAT LASTS	 OraSure Technologies	 aetna
 NEW YORK LIFE	 esurance an Allstate company	 Florida Blue In the pursuit of health	 iHeart MEDIA	 VIACOM	 DigitasLBI
 MillerCoors A MOLSON COORS COMPANY	 ABSOLUT Country of Sweden VODKA	 E. & J. Gallo Winery	 BRIDGESTONE	 JONES LANG LASALLE	 TELUS
 CIRQUE DU SOLEIL	 travelocity	 Argentina	 JNTO Japan National Tourism Organization	 JAL	 HAWAIIAN AIRLINES
 Marriott starwood Hotels and Resorts	 HYATT	 KIMPTON HOTELS & RESTAURANTS	 HAWAII TOURISM AUTHORITY	 VISITFLORIDA	 LAS Vegas CONVENTION AND VISITORS AUTHORITY
 Penn UNIVERSITY OF PENNSYLVANIA	 JOHNS HOPKINS UNIVERSITY	 CU NY THE CITY UNIVERSITY OF NEW YORK	 Planned Parenthood Act. No matter what.	 American Cancer Society	 NORTHSTAR MEMORIAL GROUP Care, Comfort and Plan
 AARP Real Possibilities	 United States Census Bureau	 Freddie Mac We make home possible	 CDC CENTERS FOR DISEASE CONTROL AND PREVENTION	 US DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT	 FDA
 nielsen	 qualtrics	 Ipsos	 GfK	 ICF INTERNATIONAL	 C+R RESEARCH

LGBTQ Market Research:

There is a difference!

LGBTQ research is meant to help marketers understand the LGBTQ community and make educated decisions about strategies and tactics to reach them.

Community Marketing & Insights (CMI) leverages our own proprietary panel to generate the valid data that our clients depend on. As an LGBTQ-owned and operated company, we understand the LGBTQ community's unique life experience. And because we have been serving clients for over two decades and have already conducted over 200 LGBTQ-specific research projects, we have the professional experience needed to deliver actionable results and recommendations.

CMI'S PROPRIETARY PANEL

Community Marketing & Insights (CMI) has recruited for our proprietary research panel over the past 25 years by partnering with over 300 LGBTQ media, organizations, events, social media and influencers throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is highly representative of LGBTQ consumers who interact with LGBTQ community organizations and media. Our panelists come from diverse sources, allowing for broad research projects or targeted segments within LGBTQ.

CMI research is trusted by—and frequently quoted in—*New York Times*, *USA Today*, *Wall Street Journal*, *Forbes*, *Newsweek*, *U.S. News & World Report*, *Los Angeles Times*, *Chicago Tribune*, *Miami Herald*, *Ad Week*, *Christian Science Monitor*, NPR, CBS News, CNN, eMarketer, Mashable, Reuters, Associated Press and many others. CMI's research is considered the definitive resource for insights into the LGBTQ community.

LGBTQ PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO "LGBTQ MARKET"

Community Marketing & Insights emphasizes that there is no "gay market," just as there is no single "Asian market." The LGBTQ communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Add to that variations in geographical location, age, income, relationship status, gender identity and more, and it becomes essential to discover which opportunities within LGBTQ will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBTQ will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

Note: General market surveys that may include a very small subset of "LGBT responses" just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.

CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS

CMI has conducted hundreds of LGBTQ-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market. Size does matter when it comes to surveys. Our panel has grown to over 90,000 qualified and active LGBTQ consumers—the largest of its kind, by far. Our Annual LGBTQ Community Survey® study has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Note: Without access to this enormous resource of qualified LGBTQ consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or "reinvent the wheel" at your expense. It's not possible to fathom the diversity and complexities within LGBTQ (see below) through a small sample. CMI fields surveys of 1,000+ responses. You might see some research with small samples, but they lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make an assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Miami? Generalities and sweeping statements about "the LGBTQ market" based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.

GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBTQ community surveys in the world. But we don't stop there. Quantitative (data) research is important, but it's just one side of the coin. Our full range of research services uncover the rest of the story through qualitative research, most notably derived from focus groups.

We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany, Australia and China, as well as many other markets. Sometimes the same creative, tested in different regions, can yield different perspectives. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns?

CMI is the only LGBTQ-dedicated research provider that produces and facilitates qualitative research, including focus group studies (both in-person and online), in-depth interviews, online communities and advisory boards, which can round out a comprehensive market intelligence plan.

Note: By producing online surveys only, other research companies are telling only half of the story...at best. Without actual consumer interaction, they cannot fathom the deeper insights hiding behind the bar graphs and pie charts. Nor can they adequately advise you on the sensitivities and complexities that can only be uncovered by qualitative research—extremely important considerations that averages and assumptions extrapolated from survey statistics are likely to miss.

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

Note: Unlike many other firms, CMI will never sell or represent another research company's services. Nor will we outsource your projects and report on the results of a third party's work. Without being intimately involved in every aspect of a project—discussing client goals, designing the study, building and implementing the survey, and engaging directly with consumers in focus groups—it is difficult to gain the insights that we regularly deliver. CMI's hands-on LGBTQ research specialization spanning over two decades is unmatched.

VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBTQ market intelligence, however, and the cumulative 60+ years of LGBTQ-dedicated experience among the CMI team, we're able to keep your costs low. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 25+ years.

Note: At CMI, we're not running a large operation juggling many accounts and projects with varied focus. Our client dedication and LGBTQ market specialization delivers you superior intelligence at a fraction of the cost.

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

Community Marketing, Inc., founded in 1992, pioneered LGBTQ consumer research. Because our company is LGBTQ-owned and -operated, and well known in the community, we have earned the recognition and trust of our survey panelists. LGBTQ consumers recognize that we use research data to build corporate relationships that ultimately lead to social progress, better conditions for LGBTQ employees, and more sensitive communications.

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBTQ-owned suppliers when sourcing products and services. When you contract with Community Marketing & Insights, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the world's only LGBTQ-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBTQ-Owned Business Enterprise.

CMI is involved in the LGBTQ community: We volunteer time, donate resources and raise funds for numerous community-based organizations. We also participate in leading business and advocacy organizations, events and conferences within the community, such as Out & Equal, HRC, National LGBT Chamber of Commerce, GLAAD, NCLR and the International Gay & Lesbian Travel Association. Our community connection is not only the right thing to do, it is essential for maintaining authentic community relationships to benefit our clients.