

# The Transgender Market:

*How to effectively reach, attract,  
and better serve transgender consumers*

**Alexis Dee, President, Southern Comfort Conference Board of Directors**

**Tom Roth, President, Community Marketing & Insights**

**David Paisley, Senior Research Director, Community Marketing & Insights**



*Thank you!*

OUT  EQUAL  
WORKPLACE ADVOCATES



## SOUTHERN COMFORT CONFERENCE

Alexis Dee is a transwoman living in North Carolina. She is married and has one daughter, Eryn, and one granddaughter Victoria.

Alexis is President of the Southern Comfort Conference organization board of directors and has worked as an event planner for 10 years. She actively works with the trans community on various issues, consults with the Greater Fort Lauderdale CVB about transgender travel, and is Chairman of TGV Holidays, LLC, a cruise booking agent.



- San Francisco-based, LGBT Owned/Operated company founded in 1992
- Serves corporate, university, organization and government institution clients throughout the USA, Canada, Europe, Australia and China
- 25 years of consumer research, strategic consulting, marketing planning, communications, and training services
- Dedicated research panel of 70,000+ LGBT consumers
- Online surveys, focus groups, virtual focus groups, in-depth interviews, intercepts and other methodologies

*Research, development, communications and marketing strategies.  
Proudly serving industry leaders since 1992*

**Some of CMI's LGBT Research, Education & Marketing Clients**





***@LGBTInsights***

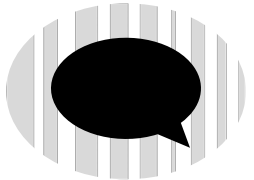
# ***WHAT WE'LL TALK ABOUT TODAY***



**SOCIAL & POLITICAL TRENDS**

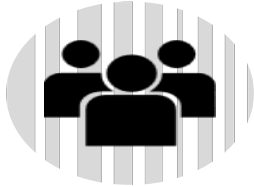


**MARKET RESEARCH**



**CASE STUDIES & BEST PRACTICES**

# *WHAT WE'LL TALK ABOUT TODAY*



## **SOCIAL & POLITICAL TRENDS**






Passcode | The Monitor  
Breakfast

The CHRISTIAN SCIENCE  
**MONITOR**

World | USA | Commentary | **Business** | Energy / Environm


**HARRY'S**  Good Razors Can  
Too Much...  
So We Fixed It

BUSINESS

**First Look**  
**H&M embraces diversity in new partnership with Caitlyn Jenner**

The fast-fashion retailer says the high-profile endorsement exemplifies the chain's mission to 'convey an image of diversity in all that we do.'

By **Michael Holtz**, Staff writer • MARCH 11, 2016 [Save for later](#)



Danny Moloshok/Reuters/File | [View Caption](#)











HOME | TV | NEWS

# Whoopi Goldberg Producing Show About Transgender Models for Oxygen



**Elizabeth Wagmeister**  
TV Reporter  
@EWagmeister



MAY 23, 2016 | 07:30AM PT

REX SHUTTERSTOCK



## Challenging Gender Roles





## Challenging Gender Roles





# The Dreaded “Bathroom Laws”

**DAILY KOS** [Join the mailing list](#)

NEWS COMMUNITY ACTION

KERRY ELEVELD

# Anti-LGBTQ Mississippi law spurs backlash from around the country

By Kerry Eleveld  
Friday Apr 08, 2016 · 12:09 PM PDT

★ 103 Reco... 98/98  
f 5193 Shares t Tweet



attribution: AFP/Getty Images

Mississippi GOP Gov. Phil Bryant



## Mississippi tourism industry faces criticism, braces for backlash

POSTED 3:04 PM, APRIL 9, 2016, BY CNN WIRE



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REDDIT



PINTEREST



LINKEDIN 1



EMAIL

By Catherine E. Shoichet

CNN

(CNN) — How do you persuade tourists to travel to your state when there's a growing chorus of criticism over a new law many gay rights groups slam as discriminatory?

That's an issue the travel industry in Mississippi is facing after Gov. Phil Bryant signed a controversial religious freedom bill Tuesday.

Here's a look at some high-profile criticisms of the new law, and how some tourism officials are responding.

**'Oppressive laws to go with our oppressive heat'**

Under the law, religious organizations can deny LGBT people marriage, adoption and foster care services; fire or refuse to employ them; and decline to rent or sell them property. Medical professionals will be permitted to refuse to participate in treatments, counseling and surgery related to "sex reassignment or gender identity transitioning."



A battle is shaping up across the country over various pieces of legislation that proponents argue protects religious beliefs while others argue are tools to discriminate.

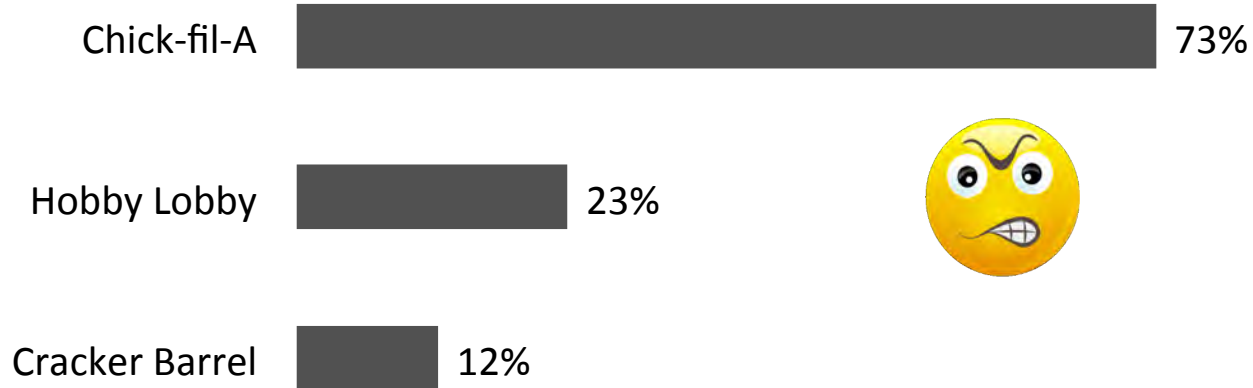




**Negative Brand Recall:** Every year CMI asks an unaided “write-in” recall question about brands that participants are boycotting because of their anti-LGBT policies or practices. Once again Chick-fil-A and Hobby Lobby lead this negative pack. Of note is that in 2016, while the survey did not ask about states (the question was about companies and brands), a significant number reinterpreted the question and wrote the states of North Carolina and Mississippi. These percentages might have been much higher if the question were asked in a different format, and may indicate that these states have done harm to their tourism brands through recent anti-LGBT legislation.



**Over the past 12 months, which companies or brands have you boycotted because of their anti-LGBT policies or practices? You can write up to 5.**



***Also of Note..***

**State of North Carolina 6%    State of Mississippi 6%**



**Mississippi Tourism Association**

on Thursday



MTA Statement on HB 1523:

“The Mississippi Tourism Association recognizes that the intent of House Bill 1523 is to protect individuals and businesses from being forced to act against their own conscience. Our members statewide are reporting calls, emails and social media posts from people cancelling or postponing trips to Mississippi due to national media reporting on this new law. Many of these tourists are known to our members personally because they are repeat guests, that...

[See More](#)



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DEPARTMENT OF JUSTICE  
WASHINGTON



# THE PEOPLE OF THE STATE OF CALIFORNIA DO ENACT AS FOLLOWS:

**SECTION 1.** Section 11139.8 is added to the Government Code, to read:

**11139.8.** (a) The Legislature finds and declares all of the following:

(1) California is a leader in protecting civil rights and preventing discrimination.

(2) California's robust nondiscrimination laws include protections on the basis of sexual orientation, gender identity, and gender expression, among other characteristics.

(3) Religious freedom is a cornerstone of law and public policy in the United States, and the Legislature strongly supports and affirms this important freedom.

(4) The exercise of religious freedom should not be a justification for discrimination.

(5) California must take action to avoid supporting or financing discrimination against lesbian, gay, bisexual, and transgender people.

(6) It is the policy of the State of California to promote fairness and equality and to combat discrimination.

(b) A state agency, department, board, authority, or commission, including an agency, department, board, authority, or commission of the University of California, the Board of Regents of the University of California, or the California State University, and the Legislature shall not do either of the following:

(1) Require any of its employees, officers, or members to travel to a state that, after June 26, 2015, has enacted a law that voids or repeals, or has the effect of voiding or repealing, existing state or local protections against discrimination on the basis of sexual orientation, gender identity, or gender expression or has enacted a law that authorizes or requires discrimination against same-sex couples or their families or on the basis of sexual orientation, gender identity, or gender expression, including any law that creates an exemption to antidiscrimination laws in order to permit discrimination against same-sex couples or their families or on the basis of sexual orientation, gender identity, or gender expression.

# Los Angeles Times

## California bans government travel to states believed to discriminate against LGBT people



People participate in the annual WeHo Dyke March on Santa Monica Boulevard in West Hollywood in 2012. (Francine Orr / Los Angeles Times)

California no longer will be able to fund or require public employees to travel to states believed to discriminate against LGBT people under a bill Gov. Jerry Brown signed Tuesday.

The new law will apply to states that have passed laws after June 26, 2015, that allow "discrimination against same-sex couples or their families or on the basis of sexual orientation, gender identity, or gender expression."

The California attorney general will create and publish a list of those states.

State agencies, the Legislature and public California universities will be subject to the new law.





## U.N. appoints first expert to protect LGBT people from violence, discrimination



By **Lin Taylor**

LONDON (Thomson Reuters Foundation) - The U.N. Human Rights Council on Friday appointed its first independent investigator to help protect homosexual and transgender people worldwide from violence and discrimination.

The United Nations expert Vitit Muntarbhorn will have a three-year mandate to investigate abuses against lesbian, gay, bisexual, transgender and intersex (LGBTI) people.

## *Discussion:*

# SOCIAL & POLITICAL TRENDS

- **Have these and other commercials and magazine covers effected real change?**
- **How effective are boycotts?**
- **Are there any negative side-effects?**

# *WHAT WE'LL TALK ABOUT TODAY*



**SOCIAL & POLITICAL TRENDS**



**MARKET RESEARCH**



# 10<sup>th</sup> Annual LGBT Community Survey®

U.S. Overview Report  
July 2016

In Partnership with



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# 10<sup>th</sup> Annual LGBT Community Survey®

## Supplemental Report: Gender Expansive Community Member Focus

A special sub-report on the opinions and motivations of the 1,278 LGBT Community Survey participants who identify as transgender, trans women, trans men, non-binary, genderqueer, gender fluid and/or intersex.

*A special thank you to these organizations for their assistance in recruiting transgender participants to the study: Fantasia Fair, Fort Worth Transcendence, Knox Boyz of East Tennessee, Los Angeles Gender Center, River City Gems, San Antonio Gender Association, South Bay Trans Day of Visibility, Southern Comfort Conference, Inc., Texas Transgender Nondiscrimination Summit, TG Forum, TILTT, Inc., Trans-E-Motion, Transgender American Veterans Association, TransTech Social Enterprises and Unity Banquet.*



# Response to Common Terms in Consumer Research

CMI's comprehensive, *inclusive* approach:

Do you identify within the LGBT Community...? **(Please mark all that apply.)**

- Lesbian or Gay Woman
- Gay man
- Bisexual woman
- Bisexual man
- Pansexual
- Asexual
- Non-binary sexual orientation
- Same Gender loving
- Heterosexual / Straight man
- Heterosexual / Straight woman
- Questioning
- Other: Please tell us
- Female
- Male
- Transgender
- Transsexual
- Trans Man
- Trans Woman
- Intersex
- Non-binary gender identity
- Genderqueer
- Gender Fluid
- Agender
- Questioning
- Other: Please tell us
- Queer
- Straight Ally
- Other: Please tell us

## Gender Expansive Identity of Participants

Only 53% of group identified as transgender

33% of those who identified as non-binary, gender fluid, or genderqueer also identified as transgender, trans man or trans woman.

29% who identify as transgender, trans man or trans woman also identified as non-binary, gender fluid, or genderqueer.

A 18% were both transgender and non-binary identified among all the gender expansive participants.

### Among All Gender Expansive

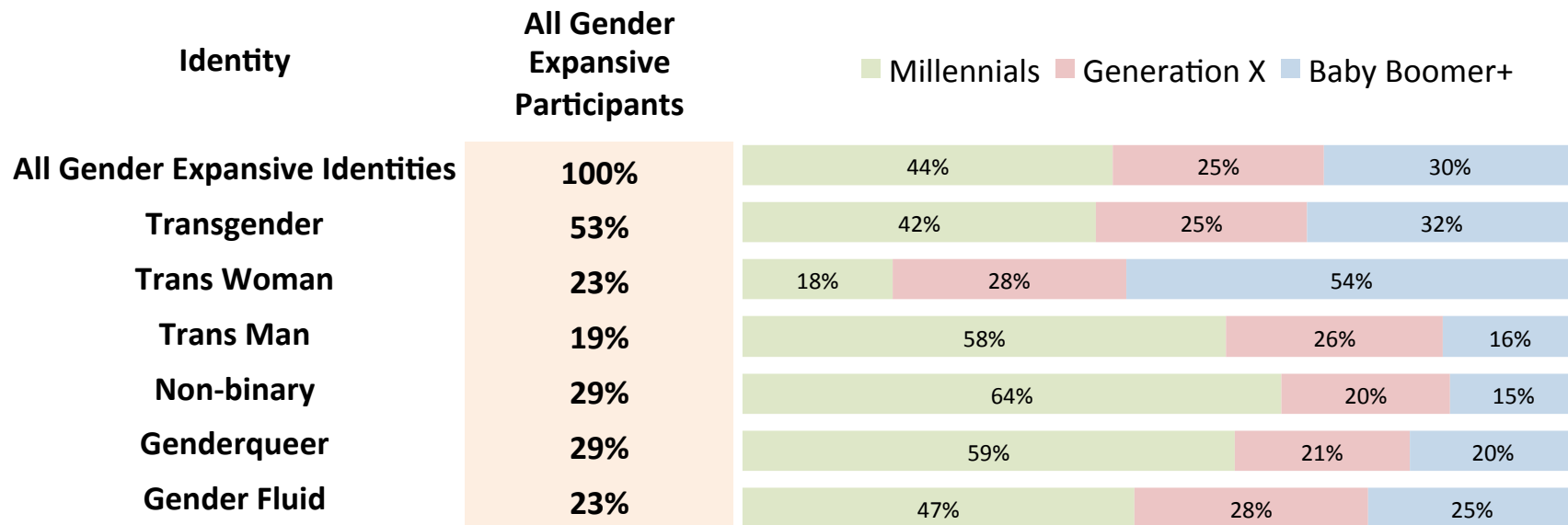
Transgender	53%
Trans Woman	23%
Trans Man	19%
Non-binary	29%
Genderqueer	29%
Gender Fluid	23%
Intersex	4%



*Note: Respondents were allowed to choose multiple identities, so the total percentage might exceed 100.*



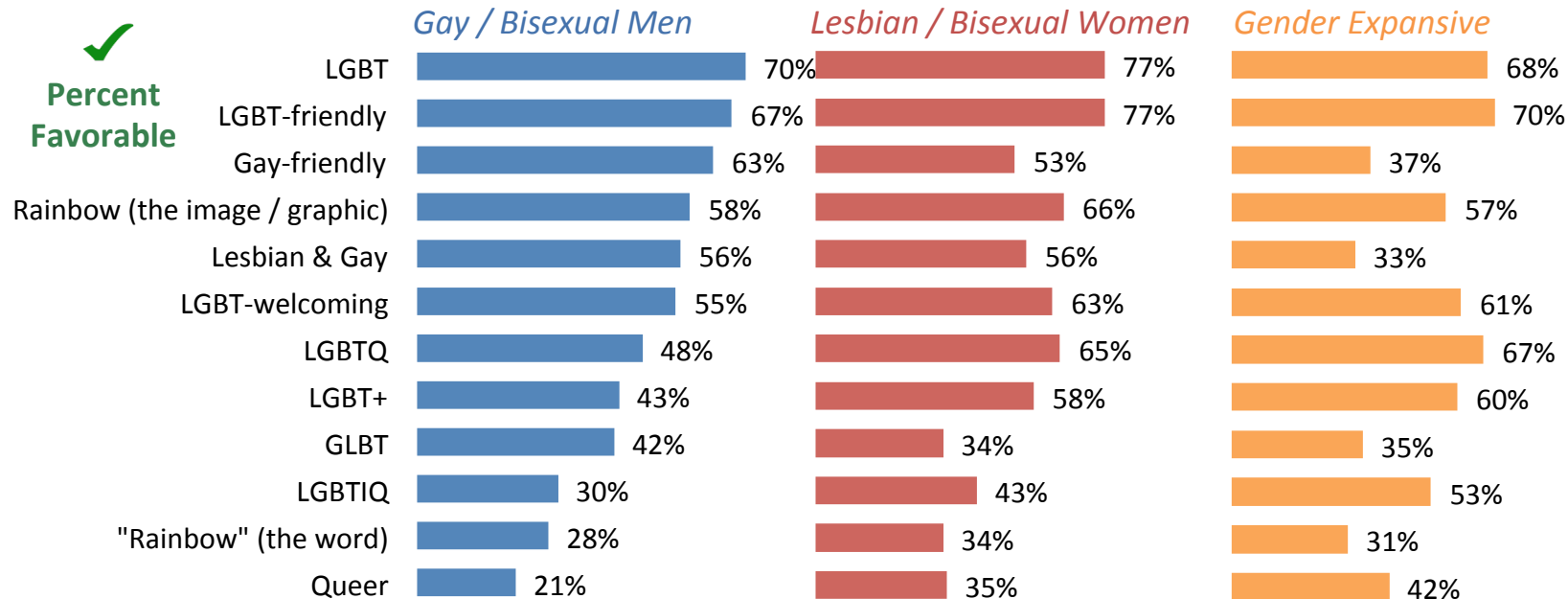
**Gender Expansive Identity by Generation:** The chart below begins to demonstrate how gender expansive identities are influenced by generation.



Base: Transgender n=681; Trans Woman n=299; Trans Man n=243; Non-binary n=369; Genderqueer n=367; Gender Fluid n=290; Intersex n=54 (base too low to run a comparison); Queer n=1,618

## Favorability of Community Terms

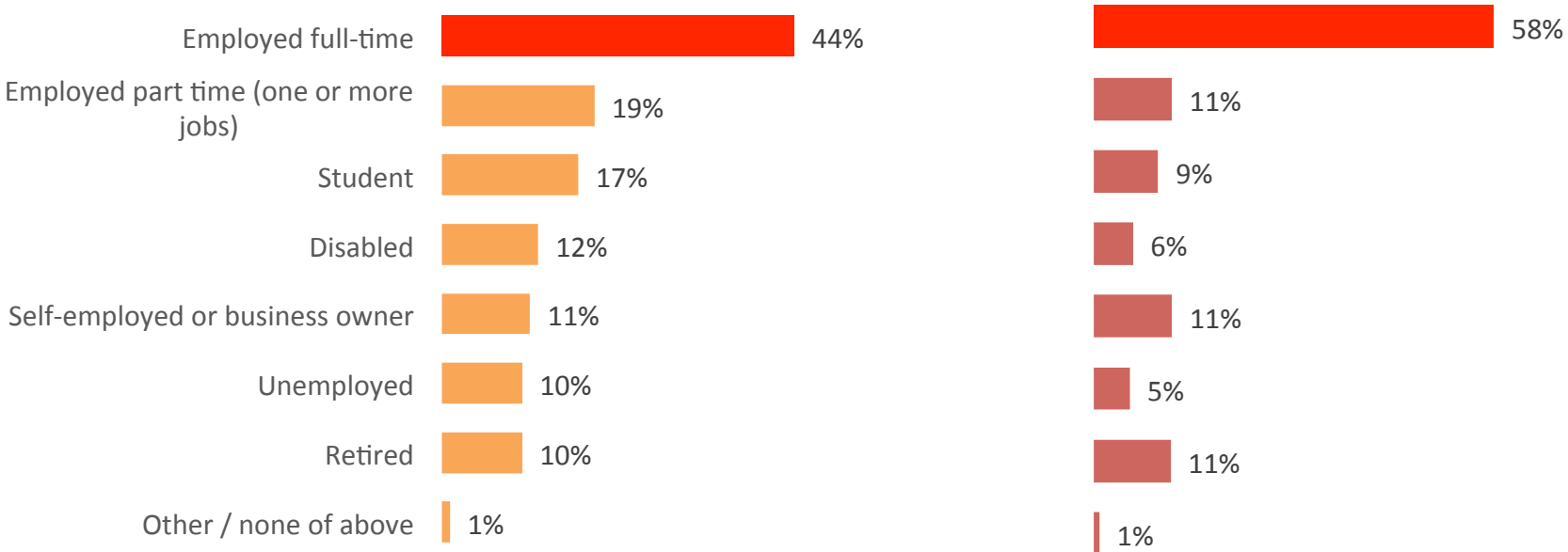
★ The following terms are often used in corporate marketing to describe or refer to the community. Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...



**Employment:** We found differences in employment status between gender expansive participants and lesbian, gay and bisexual participants, which may indicate employment discrimination.

**All Gender Expansive**

**Lesbian + Gay + Bisexual Women + Bisexual Men**



Base: All Gender Expansive n=1,278; Transgender + Trans Men + Trans Women n=802

Non-binary + Genderqueer + Gender Fluid n=701;

Lesbian + Gay + Bisexual Women + Bisexual Men n=12,610



**LGBT Economic Outlook:** Gender expansive participants have a neutral to slightly positive economic outlook. 38% of gender expansive participants expressed a positive outlook, but that is compared to 57% of gay and bisexual men and 52% of lesbian and bisexual women.



On a 5-point scale, how would you rate your current financial situation?

<b>5 – Very Positive</b> I'm doing great financially	<b>9%</b>
<b>4 – Positive</b> Financially doing better than most	<b>29%</b>
<b>3 – Neutral</b> I'm doing alright financially but just breaking even	<b>38%</b>
<b>2 – Negative</b> I'm falling behind financially	<b>13%</b>
<b>1 – Very Negative</b> I am struggling to make financial ends meet	<b>10%</b>

**Relationship Status:** Most community members with a gender expansive identity define their relationship status as non-single. Most gender expansive participants are coupled, and marketers should recognize these family structures in their outreach and communications.

	Identifies as Gender Expansive	Identifies as Gay or Bisexual Man	Identifies as Lesbian & Bisexual Woman
Single / not in a relationship	38%	45%	28%
In a relationship and living with partner (no legal status)	15%	18%	19%
In a relationship but not living with partner (dating)	14%	10%	12%
Legally married	28%	22%	35%
Engaged	4%	3%	4%
Civil union or registered domestic partner	2%	2%	3%
Widow / Widower	2%	2%	1%
Divorced from same-sex spouse	3%	1%	3%
Divorced from opposite-sex spouse	9%	2%	4%





**Children:** A high number of gender expansive participants have children. The highest concentration by age is in Generation X. Of note is the high number of Baby Boomer and Transgender participants with children over age 18.

	Gender Expansive Millennials	Gender Expansive Gen X	Gender Expansive Boomert+
Have children under age 18 living in my home.	8%	21%	5%
Have children under age 18 not living in my home.	1%	5%	3%
Have children over age 18.	0%	13%	46%
No	91%	64%	47%

Base: All Gender Expansive n=1,278; Transgender + Trans Men + Trans Women n=802;

Non-binary + Genderqueer + Gender Fluid n=701; Among Gender

Expansive: Millennials n=564; Gen X n=321; Boomers+ n=385



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**Type of Community:** The type of community in which gender expansive participants live is quite dispersed across the United States, and where gender expansive community members call home is more varied than other groups within the LGBT community. This points to the importance of laws protecting the transgender community at the state and local levels, not just in large cities and urban centers.

	Identifies as Gender Expansive	Identifies as Gay or Bisexual Men	Identifies as Lesbian or Bisexual Women
Urban / big city	30%	46%	33%
Medium sized city	27%	23%	27%
Small city / small town	18%	11%	16%
Suburb	17%	14%	18%
Rural area	9%	5%	6%

**Major Purchases:** The study asked about major purchases by those in the gender expansive community. The 2016 data is more of a baseline for comparison in future years. Major purchases is often an indicator of financial confidence, and will be used to demonstrate change in financial confidence in the future.

★ Have you (or you and your partner) purchased any of the following major items during the past 12 months?  
(Please mark all that apply.)



Audio or visual electronics for home  
(U.S. \$500 or more)

20%



Major piece of furniture  
(U.S. \$500 or more)

16%



Purchased (or leased) a new automobile

16%



A new suit, dress or expensive clothing item  
(U.S. \$500 or more)

12%



Major home remodel

6%



Purchased a new primary home or condo

4%



Purchased a vacation home or timeshare

1%



*All Gender Expansive*

**Experience Purchases:** The 2016 data is more of a baseline for comparison in future years. Experience purchases can often be seen as an indicator of disposable income and will be used to demonstrate change in financial confidence in future reports.

★ Have you purchased any of the following experiences during the past 12 months? (Please mark all that apply.)



Tickets to a live theater production

**36%**



Salon services or spa treatments

**34%**



Tickets to a cultural performance  
(e.g. ballet, opera, symphony)

**33%**



Tickets to a headliner music concert

**27%**



Tickets to a non-profit fundraising event  
of U.S. \$100 or more

**14%**

All Gender Expansive

## LGBT Media Consumption Patterns



In the past 30 days, have you read any of the following print media...? (Please mark all that apply.)

LGBT publications/newspapers for my city or region

LGBT national magazines

	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender Expansive
LGBT publications/newspapers for my city or region	51%	40%	43%
LGBT national magazines	35%	25%	26%



In the past 30 days, have you viewed or listened to any of the following...? (Please mark all that apply.)

LGBT websites / blogs

LGBT email newsletters

LGBT-dedicated TV channel

LGBT mobile apps (non-dating)

	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender Expansive
LGBT websites / blogs	69%	63%	79%
LGBT email newsletters	45%	42%	49%
LGBT-dedicated TV channel	25%	11%	13%
LGBT mobile apps (non-dating)	17%	8%	14%

## LGBT Media Consumption Patterns



Do you have, and have actively used (at least once per week), any of these social media and dating websites/apps in the past 30 days? (Please mark all that apply.)

	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender Expansive
Facebook	86%	87%	86%
YouTube	70%	65%	70%
Instagram	41%	38%	34%
Snapchat	24%	21%	21%
Tumblr	39%	18%	32%
Twitter	37%	34%	35%
LinkedIn	41%	37%	30%
Pinterest	17%	30%	23%
Google+	25%	22%	24%
Vine	5%	3%	3%
Flickr	4%	4%	5%

## LGBT Event, Neighborhood and Community Participation



In the past 12 months, have you viewed or participated in any of the following? (Please mark all that apply.)

	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender Expansive
Watched an LGBT-inclusive TV show	67%	69%	66%
Visited a bar / nightclub for the LGBT community	62%	41%	41%
Attended LGBT pride event(s)	49%	49%	49%
Donated to LGBT organization(s)	43%	40%	40%
Attended an LGBT organization fund-raiser, gala, etc.	31%	27%	32%
Volunteered at LGBT organization(s)	23%	22%	32%
Attended an LGBT film festival	11%	10%	10%

## *Discussion:*

# MARKET RESEARCH

- A lot of attention has been given to the “LGBT” market, gay market and lesbian market; but less on the transgender or gender expansive market. What are the differences between transgender consumers vs. gay or lesbian consumers?
- What are the most effective ways to reach the transgender market?



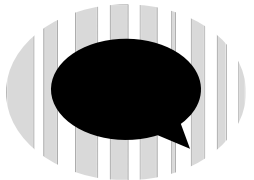
# ***WHAT WE'LL TALK ABOUT TODAY***



**SOCIAL & POLITICAL TRENDS**



**MARKET RESEARCH**



**CASE STUDIES & BEST PRACTICES**

# *LGBT is part of diversity.* *Diversity is part of LGBT.*



# Diversity *within* LGBT: Transgender

## Case studies:

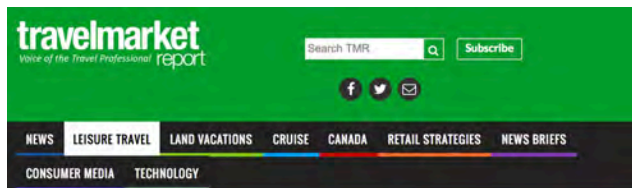
- Fort Lauderdale: Transgender *consumers*
- Marriott: Transgender *inclusive*
- Target: Transgender *proactive*



# FORT LAUDERDALE CASE STUDY: Transgender Consumers

# Case Study: Fort Lauderdale

*A seasoned LGBT destination constantly working to **reinvent** itself*



## Greater Fort Lauderdale on the Rise

by Anna Gleksman / February 26, 2016



### TOP STORIES

#### Disney World Makes the Price Increase Worth It



A whole new world of nocturnal experiences on the savannah add some grit after Frozen and Star Wars.

Read...

#### 10 Reasons We Travel



We're hearing that customers are feeling that wanderlust but in need of a little nudge to push them into making the decision to buy. Here's a little handout that might help.

Read...

### LGBT Destination

Among its claims to fame is the openness of the Fort Lauderdale community to LGBT travelers. Where until now the first two took precedence, Fort Lauderdale now is focusing on the transgender market.

"We have long understood gay and lesbian travelers, but we recognize now is the time to emphasize the importance of the transgender market and ensure it is not forgotten," said Richard Gray, managing director for the LGBT market at the Greater Fort Lauderdale Convention & Visitors Bureau. GFLCVB issued one of the first and largest surveys in North America to identify the travel motivations, needs, and priorities of the market in 2014. It found that the city has the highest concentration of same-sex couple households in the nation, and is the destination of choice of the LGBT community because of its gay-owned and -operated businesses.

According to Grossman Greater Fort Lauderdale has undergone a lot of changes "new skyline, new vibe, energetic, active place to participate."



# CMI's LGBT RESEARCH PANEL

25 YEARS OF LGBT INSIGHTS

*In the United States, CMI's panel has significant numbers in every LGBT segment*

- 20,000 lesbian and bisexual women
- 30,000 gay and bisexual men
- 5,000 bisexual community members
- 3,000 transgender community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 15,000 representing LGBT communities of color
- 15,000 LGBT Millennials
- Participants in all 50 states with zip code-level geographic targeting capability
- 10,000 with a Masters degree or better
- 4,000 LGBT parents with a child under 18 living at home
- 8,000 legally married same-sex couples

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



Produced By:







**Authentically “Transgender-friendly”:** Respondents felt that any destination can help make the community a friendlier place, encouraging anti-discrimination laws, gender neutral public facilities and conveying their efforts in their communications in an authentic way.

In a sentence or two, please tell us how a destination can authentically make the transgender community feel more welcome?

#### Influencing Local Culture and Politics

##### Legislation

- Having anti-discrimination/anti-hate crime laws
- Enforcing those laws
- Including gender identity in existing anti-discrimination laws

##### Education and Community Infrastructure

- Staff training (especially for hospitality industry) including cultural sensitivity
- Correct pronoun usage (neutral terms rather than ma'am or sir to address customers)
- Gender neutral restroom facilities/access
- Hiring transgender employees and supporting the community
- Non-gender binary infrastructure (identification forms that require Mr. or Ms. only)

#### Marketing & Communications

##### Imagery

- Integrating the “T” in LGBT marketing communications

##### Targeted Communications

- Mainstream and LGBT targeted ads. Many might not identify as part of a “transgender” community, but rather as a gay male, lesbian, or even as straight, especially after transitioning).
- Communications should explain why the destination is genuinely friendly and safe for LGB and T.
- Gender neutral language.
- Featuring “TG-friendly” communities, local groups, etc. that may be of interest.

Base: Transgender n=514











[home](#) / [lgbtq travel](#) / [transgender](#)

- [stay](#)
- [eat](#)
- [play](#)

## where happy meets go lucky

Proudly welcoming the [26th Annual Southern Comfort Conference](#) to our sunny shores, Sept 27-Oct 2, 2016.



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greater FORT LAUDERDALE

75°

ENGLISH

FOLLOW

## resources:

### Equality Florida

Securing equality & justice for Florida's lesbian, gay, bisexual and transgender community.

[www.eqfl.org](http://www.eqfl.org)

Contact: Gina Duncan, Transgender Inclusion Director [Gina@eqfl.org](mailto:Gina@eqfl.org)

### Gender Warriors

A national educational, advocacy, and social group for trans and gender queer people and others who want to further the cause.

[www.genderwarriors.com](http://www.genderwarriors.com)

### The Pride Center at Equality Park

2040 N. Dixie Hwy, Wilton Manors, FL 33305

954-463-9005

Providing a welcoming, safe space - an inclusive home that celebrates, nurtures and empowers the LGBTQ communities and friends and neighbors in South Florida.

[www.pridecenterflorida.org](http://www.pridecenterflorida.org)

Contact: S.F. Makalani-MaHee

### REFUGE Restrooms

Provides safe restroom access for transgender and gender nonconforming individuals.

[Greater Fort Lauderdale listings](#)

### SunServe Inc

2312 Wilton Dr, Wilton Manors, FL 33305

954-764-5150

South Florida's Gay, Lesbian, Bisexual, Transgender+ Social Service Agency

[www.sunserve.org](http://www.sunserve.org)

Contact: Arianna Lint, Director of Transgender Services

Aspen Hawke, Business Development Specialist, 954-764-5150

### T-House

A digital drop-in center serving the Transgender community in Greater Fort Lauderdale.

[Transgender Events Calendar](#)

[www.t-houseonline.com](http://www.t-houseonline.com)



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□

Sheriff Scott J. Israel  
Broward Sheriff's Office  
2601 West Broward Boulevard  
Fort Lauderdale, Florida 33312  
954.831.8901 • Fax : 954.321.5040  
[www.sheriff.org](http://www.sheriff.org)



December 2014

Dear Broward Visitor:

Welcome to our great – and safe – community. We hope you will enjoy your time in Broward County.

I'd like to thank the Greater Fort Lauderdale Convention & Visitors Bureau (GFLCVB) for inviting me to pen this message of welcome to LGBT travelers. Tourism is an important component of our South Florida economy, and LGBT vacation and business travelers are a valued segment of our tourism market.

At the Broward Sheriff's Office (BSO), we proudly value and embrace diversity. BSO has employment non-discrimination policies that explicitly extend protections to include the categories of sexual orientation and gender identity. That inclusive outlook extends into our hiring, as BSO proudly employs out lesbian, gay, bisexual, and transgender employees. LGBT employees are even represented in our senior command staff. Additionally, we have long included sensitivity and diversity components into our training programs for our deputies and our firefighter/paramedics.



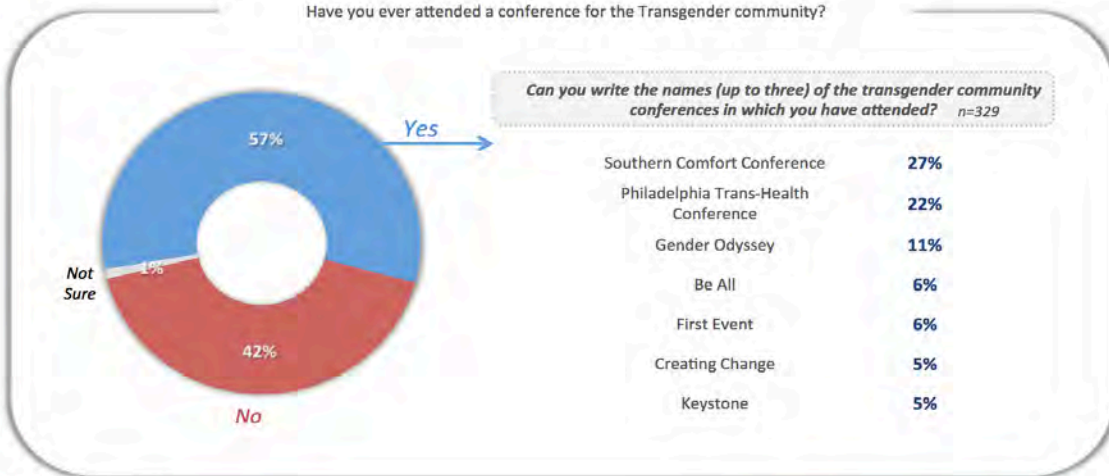
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**Transgender Conferences:** 57% of respondents indicated attending a conference for the transgender community sometime in the past. Transgender travel creates significant group travel opportunities for the travel industry.

Have you ever attended a conference for the Transgender community?



Base: Transgender n=698



## *Discussion:*

# Fort Lauderdale Case Study

- How did it come about that the Southern Comfort Conference moved from Atlanta to Fort Lauderdale?
- What did the Fort Lauderdale CVB do to attract the business?
- Why were they interested?
- What were some of the challenges they faced?
- What were some of the challenges that SCC faced?

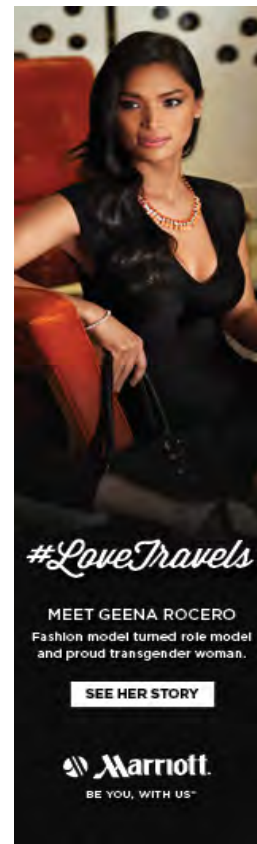
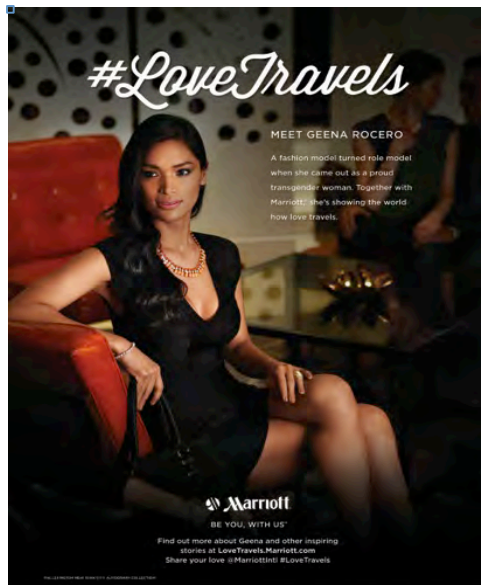


# MARRIOTT

## CASE STUDY:

### Transgender Inclusive

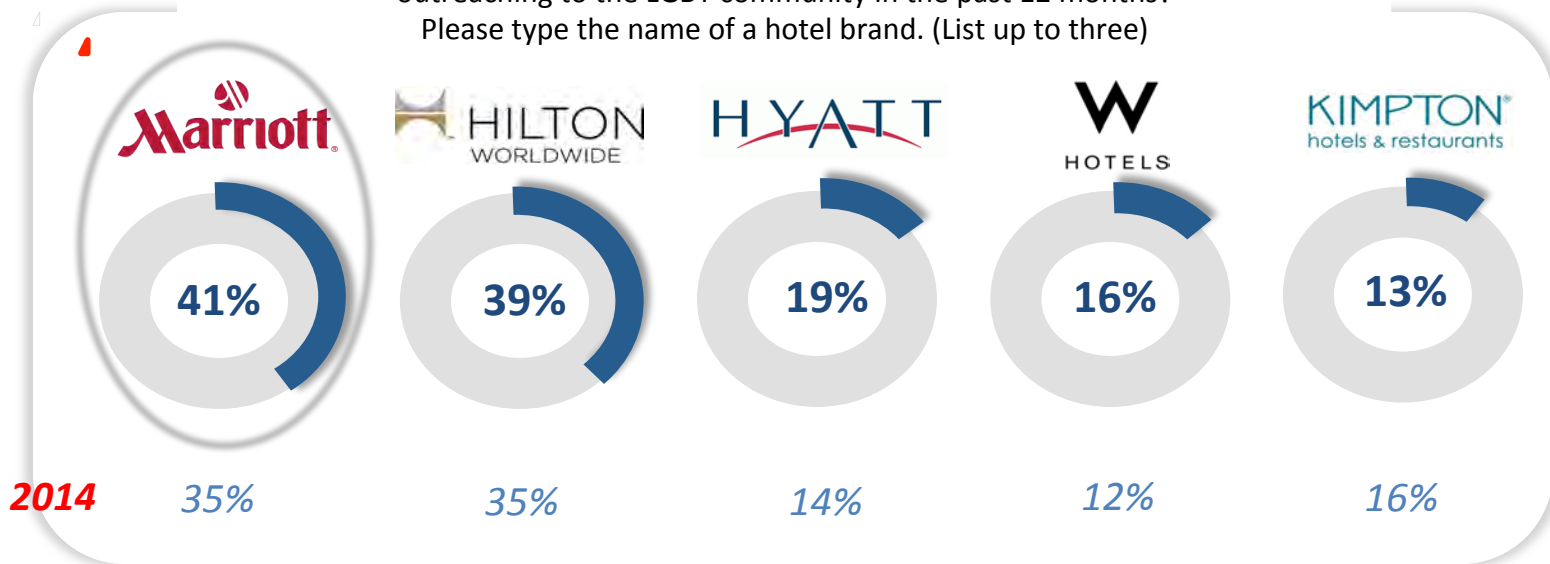
# Case Study: Marriott



**Top Ranking Hotels:** With Marriott’s “Love Travels” campaign, the company has risen to the top hotel brand recognized for their LGBT outreach efforts. Of note is that four of the top five brands had better numbers in 2015, compared to 2014. This hotel brand awareness question has been asked in this format in the annual survey since 2009. During that time, **Marriott ranked number five in 2009** and has risen to number one through their considerable focus in outreach to the LGBT community.

Of all the hotel brands or chains in the world, which chains/brands have done the best job outreaching to the LGBT community in the past 12 months?

Please type the name of a hotel brand. (List up to three)



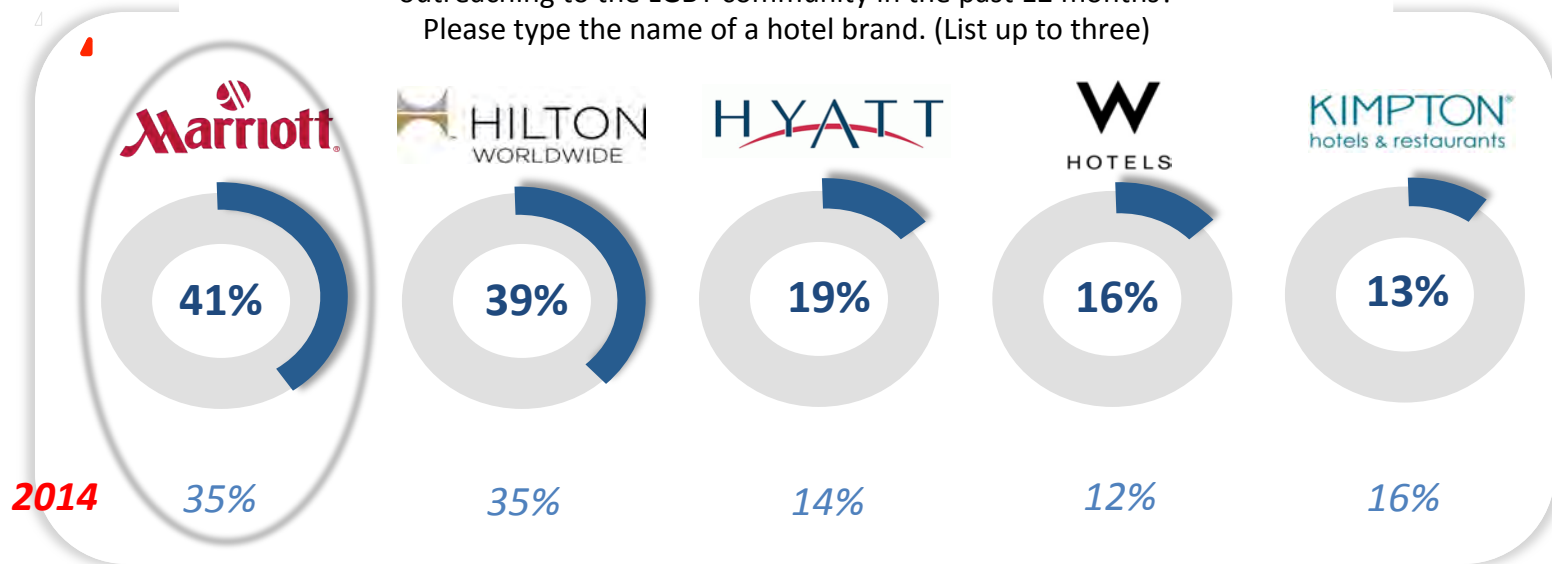
Bases: All USA LGBTs (Provided at Least 1 Valid Hotel Name) n=2,067



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# TARGET CASE STUDY: Transgender Proactive



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

# Case Study: Target 2015

The screenshot shows an NBC News article from August 10, 2015. The article title is "Target Ditches Gender Labels on Toys, Home and Entertainment" by Kathryn Robinson. The main image is a news anchor standing in front of a Target store with a sign that says "TARGETING A NEW AUDIENCE". A "TODAY'S CONSUMER" banner at the bottom of the image reads: "TARGETING A NEW AUDIENCE RETAIL GIANT LATEST STORE TO GO GENDER NEUTRAL". To the right of the article is a tweet from Abi Bechtel (@abirne) that says "Don't do this, @Target" with 2,889 retweets and 3,028 likes. The tweet is circled in red.

# Case Study: Target 2016

**The Washington Post**

Target: Customers welcome in fitting rooms, bathrooms corresponding with 'gender identity'

By Yanan Wang April 20

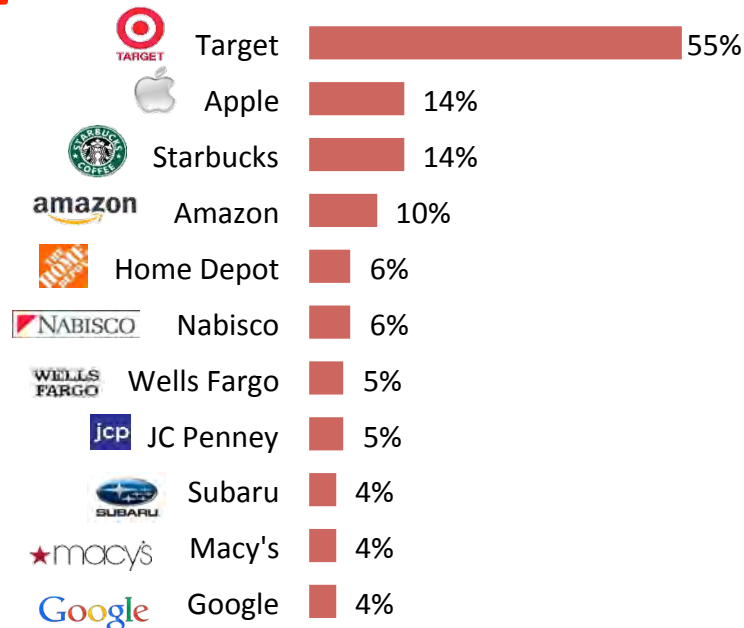


(AP Photo/Steven Senne, File)

**Favorable 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-LGBT policies or practices. This year was unusual in that the survey fielded at the time as Target was making headlines about their supportive transgender policies. While Target has been a top-three LGBT brand for many years, their brand support rocketed from about 20% of the LGBT community in 2015 to over 50% today. The 2016 results clearly show the favorable impact gained by brands taking a stand for the transgender community specifically, and for the LGBT community in general.



**Over the past 12 months, which companies or brands have you made a conscious decision to purchase from because of their pro-LGBT policies or practices? You can write up to 10.**



Base: Gay and Bi Men n=3,500;  
Lesbian and Bi Women n=1,405

## *Discussion:*

# CASE STUDIES AND BEST PRACTICES

- What are some other case studies?
- What are some **trans marketing and communications best practices** that companies should consider?

***Thank you!***

OUT  EQUAL  
WORKPLACE ADVOCATES





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*@LGBTInsights*

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







# ABOUT CMI'S LGBT RESEARCH PRACTICE

Founded in 1992, Community Marketing & Insights (CMI) is a full-service market research firm, focused on LGBT insights and analytics.

Market research studies and resulting insights and action items are meant to help marketers understand the LGBT communities, and influence sales, marketing and outreach decisions. However, not all research is the same. Community Marketing & Insights' (CMI) methodologies and experience are distinct from other research companies when considering approaches, survey respondent sources—and ultimately—the validity and utility of sought-after results.

Community Marketing & Insights (CMI) has been conducting LGBT consumer research for 25 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards in North America, Europe and Asia. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, product development, measurable marketing planning and assessment of return on investment.

CMI's research findings have been published in the New York Times, Wall Street Journal, Forbes, Washington Post, Chicago Tribune, Los Angeles Times, USA Today, Chicago Tribune, Miami Herald, CBS News, CNN, NPR, Reuters, Associated Press and many other international, national and regional media.

CMI's research and corporate training clients span the globe, and include leaders from a wide range of industries. CMI studies have been produced for these and many other B2B and B2C brands: Aetna, Inc.; Credit Suisse; Prudential Financial; Wells Fargo; DIRECTV, LLC; Viacom/Logo; Johnson & Johnson; WNBA; Hallmark Cards, Inc.; Target Brands; E&J Gallo Winery; Gilead Pharmaceuticals; Better Homes & Gardens Real Estate; TELUS Corporation; Hyatt Hotels Corporation; Hawaiian Airlines; NYC & Company; Las Vegas Convention & Visitors Authority; VISIT FLORIDA; Hawaiian Tourism Authority; Canadian Tourism Commission; Tourism Office of Spain; Japan National Tourism Organization; U.S. Census Bureau; Centers for Disease Control; American Cancer Society; Kaiser Family Foundation; University of Pennsylvania; City University of New York; and numerous other corporations, universities and organizations across North America and around the world.





## ABOUT THE CMI RESEARCH PANEL

Over the past 20 years, CMI has developed the world's most community-representative panel for a variety of LGBT research methodologies. Corporations, government agencies, non-profits, universities and other research firms all utilize CMI's panel resources because of its size and flexibility. CMI can assist with research projects requiring thousands of participants, and we can deliver on smaller projects requiring targeted segments within LGBT. For example, CMI was able to recruit for projects needing 1,200 men living with HIV, 200 LGBT African American Millennials in urban U.S.A., and 750 transgender community members. We also produce qualitative projects that are challenging—or impossible—for other research groups to achieve.

CMI has developed our panel through authentic partnership and trust within the LGBT community. CMI never uses the panel for sales or marketing purposes. Panel members have the direct email addresses of their project's Research Director. We protect panelist confidentiality, and we respond to study questions, concerns and feedback within 24 hours. Since CMI is a specialized LGBT-owned and operated company, established over 20 years ago, we have earned a level of confidence and trust that can only come from being members of the community. As distinct from other panel approaches, we actually have a very personal relationship with our panelists, who are willing to open up and honestly share genuine experiences, sensitivities, opinions and motivations with us. They know that the results from the research will be used for the betterment of the LGBT community.

### CMI'S PANEL CONSISTS OF OVER 70,000 SELF-IDENTIFYING LGBT COMMUNITY MEMBERS, WHICH INCLUDES:

- 60,000 LGBT panelists in the United States
- 7,000 LGBT Canadians (includes English and French speaking)
- 4,500 LGBT Chinese
- Capabilities in the UK, Germany, Australia and other countries

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

- Over 20,000 lesbian and bisexual women
- Over 30,000 gay and bisexual men
- 3,000 transgender community members
- 5,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 15,000 representing LGBT communities of color
- 15,000 LGBT Millennials
- Thousands of men living with HIV (Note: All health-related data is maintained independent of personally identifying information)
- Participants in all 50 states with ZIP code-level geographic targeting capability
- 10,000 with a master's degree or better
- 4,000 LGBT parents with a child under 18 living at home
- 8,000 legally married same-sex couples
- Experience with LGBT youth research (in partnership with an institution and IRB approval)

## CMI'S LGBT STRATEGIC PLANNING & CORPORATE TRAINING

**CONSULTING:** Evaluating your opportunities and strengths based on research findings, strategic consulting identifies brand and product positions that can lead to maximum success and return on investment. We'll also assess your corporate policies and practices—crucial to LGBT loyalty. LGBT consumers tend to vote with their wallets: they favor good corporate/community citizens.

**TRAINING:** The Community Marketing team has developed and presented custom on-site training for a wide variety of companies and organizations exploring their opportunities in the LGBT community. The trainings may include topics ranging from a basic introduction to the LGBT community, research, case studies and marketing opportunities...to diversity/sensitivity training best practices...to sales training and customer service.

*LGBT Community Survey and Community Marketing are registered trademarks of Community Marketing, Inc.*

*Minority/Diversity Procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT-Owned Business Enterprise.*



## CONTACT US

Visit [www.CMI.info](http://www.CMI.info), email [research@CommunityMarketingInc.com](mailto:research@CommunityMarketingInc.com), or call +1 415-437-3800

584 Castro St., #834, San Francisco CA 94114 USA

# LGBT Market Research:

*There is a difference!*

LGBT research is meant to help marketers understand the LGBT community, and make educated decisions about strategies and tactics to reach them. Not all research is the same, however. At **Community Marketing & Insights**, we leverage unique experience, methodologies and our own proprietary panel to generate the valid and actionable results that our clients depend on.

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## CMI'S PROPRIETARY PANEL: WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has recruited for our proprietary consumer panel over the past 25 years by partnering with over 300 LGBT media, organizations, events and social media throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is thus highly representative of LGBT consumers who interact with the LGBT community and media.

CMI research is trusted by—and frequently quoted in—The New York Times, USA Today, The Wall Street Journal, Chicago Tribune, Los Angeles Times, Miami Herald, Forbes, Ad Week, NPR, CNN, CBS News, Associated Press, etc.

*Other research providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate in a survey that they are gay or lesbian. They may also use lists from one or two LGBT publishers, which is likely to skew results.*

*If you are a marketer looking for valid LGBT consumer insights about products, services, or advertising creative and marketing strategies, “general market” panel development approaches are not likely to yield LGBT community members who interact with the media where you are placing ads.*

## CMI'S QUANTITATIVE SURVEYS: SIZE DOES MATTER

CMI has conducted hundreds of LGBT-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 70,000 qualified LGBT consumers—the largest of its kind, by far. Our Annual LGBT 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.

If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations.

*Without access to this enormous resource of qualified LGBT 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 LGBT (see below) through a small sample. And with small samples, you lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Atlanta? Generalities and sweeping statements about “the LGBT market” based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.*

## LGBT PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO “LGBT MARKET”

Community Marketing & Insights emphasizes that there is no “gay market,” just as there is no single “Asian market.” The LGBT 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 LGBT will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBT will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

*General market surveys that may include a small subset of “the gay community” just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.*

## GET A DEEPER UNDERSTANDING OF THE LGBT COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBT 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 LGBT-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.

*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.

*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 LGBT 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 LGBT market intelligence, however, and the cumulative 60+ years of LGBT-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.

*At CMI, we're not running a large operation juggling many accounts and projects with varied focus. Our client dedication and LGBT 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 LGBT consumer research. Because our company is LGBT-owned and -operated, and well known in the community, we have earned the recognition and trust of our survey panelists. LGBT consumers recognize that we use research data to build corporate relationships that ultimately lead to social progress, better conditions for LGBT employees, and more sensitive communications.

## PROUDLY LGBT-OWNED AND -OPERATED

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBT-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 LGBT-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBT-Owned Business Enterprise.

## AND PROUD OF OUR COMMUNITY CITIZENSHIP

CMI is involved in the LGBT 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 Gay & Lesbian 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.



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

**LGBT Community Research Studies,  
Strategic Consulting and Corporate Training**  
*since 1992*