CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

CMI's 12th Annual
LGBTQ Community Survey®

USA Report
June 2018

Sponsored by

WELLS FARGO

In partnership with

Rivendell *the gay media company!*

ABOUT CMI: 25 YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has been conducting LGBTQ consumer research for 25 years. Our practice includes online surveys, in-depth interviews, focus groups (on-site and online), intercepts, and advisory boards in North America, Europe, Asia and Australia. 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, measurable marketing planning, and assessment of return on investment.

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

CMI's research clients include leaders from a wide range of industries. CMI studies have been produced for these and many other clients: AARP, Freddie Mac, Wells Fargo Bank, Credit Suisse, Aetna Insurance, New York Life, Aurora Health Care, DIRECTV, Target Brands, Johnson & Johnson, WNBA, Esurance, Hallmark, Greater Fort Lauderdale Convention & Visitors Bureau, Las Vegas Convention & Visitors Authority, NYC & Company, Kimpton Hotels & Restaurants., W Hotels, Tourism Toronto, Argentina Tourism Office, Tourism Office of Spain, Hawai'i Tourism Authority, United States Census Bureau, US Housing & Urban Development, American Cancer Society, Planned Parenthood, Kaiser Family Foundation, and numerous other corporations and organizations across North America and around the world.

ABOUT CMI's 12th ANNUAL LGBTQ COMMUNITY SURVEY
METHODOLOGY & ASSUMPTIONS

INVITATION TO PARTICIPATE

Over 200 global study partners participated in recruiting LGBTQ community members to complete the survey. A full list is presented on slide 5. Partners include LGBTQ media, events and organizations. Partners used a combination of print ads, digital ads, apps, membership email broadcasts, influencers, blogs, and social media for recruitment.

GLOBAL SURVEY RESPONDENTS

Over **40,000** respondents across **151 countries** participated in the 2018 survey, which was fielded in English, Spanish, French, and Hungarian.

USA RESPONDENTS OVERALL

This report focuses on the **U.S. data** for **12,934** self-identified gay and bisexual men, **4,205** lesbian and bisexual women, and **1,604** transgender and gender-expansive community members. This is a total of **18,743** USA participants aged 19 to 76.
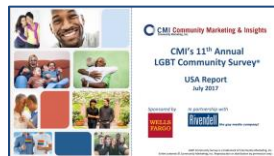
HIGHLIGHTS FROM THE 2017 COMMUNITY SURVEY

This report contains an additional section featuring highlights from our 11th annual report. (Some of our questions are asked every other year, and selected results from 2017 are provided.)

CMI would like to acknowledge the dedication and commitment of Lu Xun, CMI's Quantitative Research Director, for her outstanding work on this study.

Grab a coffee, take a survey, change the world. Making a Difference is Easy.

Take the 12th Annual LGBTQ Community Survey®

LGBTQsurvey.com

CMI Community Marketing & Insights

Proudly LGBTQ-owned and -operated
A pioneer in LGBTQ research, founded in 1992
NGLCC-Certified LGBTQ Owned Business Enterprise

Your information is confidential, used for research purposes only. You will not be contacted for marketing purposes.

ABOUT CMI's 12th ANNUAL LGBTQ COMMUNITY SURVEY

RESEARCH METHODOLOGY & ASSUMPTIONS

IDENTITY

The Community Marketing & Insights (CMI) Annual LGBTQ Community Survey® allows participants to self-identify with a wider and more inclusive spectrum of identities within the LGBTQ community. In addition, the survey allows participants to select *all that apply* for multiple gender, sexual orientation, and community identities. For example, a participant may identify as a transgender, female, straight woman, or as male, queer and bisexual, or any combination that the participant feels comfortable with.

RECRUITMENT SOURCES

Survey respondents are recruited through CMI's proprietary LGBTQ research panel (13% of all participants), and through our partnerships with 200+ global LGBTQ media, events and organizations (87% of participants). Because CMI has little control over partner sample or response, we do not profess that these results are representative of the "entire LGBTQ community." Instead, these results are a large sample of LGBTQ community members who interact with hundreds of LGBTQ media and events. CMI views these results as most helpful to marketers and organizations that want to reach the community through LGBTQ media and/or sponsorship outreach. Because study partners do not attract LGBTQs in proportionate and appropriate gender and generational ratios, the report presents the data by demographic segments. Statistics presented in the report have been weighted, and divided into nine cohorts based on their gender identity and generation. That all said, regardless of the lack of full control of the sample and varying partners year-to-year, results remain remarkably consistent on multi-year tracking questions, which is most likely due to the large sample size and like-minded outreach partners.

SEGMENTATION & WEIGHTING

Identity data presented includes gay and bisexual men, lesbian and bisexual women and gender-expansive. Generations reported include Millennial Plus (born 1981-1999), Generation X (born 1965-1980), and Baby Boomer Plus (born 1942-1964). The presentation of findings from the three identities and the three generations produces the nine sub-groups. Typically, data is presented by demographic group, as CMI emphasizes that gender identity and generation distinctions are often more informative than "*all LGBTQ*" results. However, when the report does present an "all LGBTQ" result, it is based on two broad weighting assumptions: (1) Each of the three major adult generations are equally weighted; (2) Gay and bisexual men make up 46% of the community, lesbian and bisexual women make up 46% of the community, and those with gender-expansive identities make up 8% of the community. CMI allocated these percentages in an effort to balance the perspectives by gender and generation, and based the percentages on a review of other research attempting to identify the percentages that make up the L, G, B, T and Q. The survey's gender-expansive category includes participants who identify as transgender, trans men, trans women, genderqueer, gender fluid, non-binary, Two Spirit, agender and/or intersex. CMI acknowledges that the bisexual men and women in our survey do not represent the *entire* bisexual population. They represent bisexual people who are being reached through, and who are engaged with, LGBTQ media, events and organizations. Because of the recruitment sources, results often do not show substantive differences between gay vs. bisexual men, or lesbian vs. bisexual women, which is the reason that we combine into one category.

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**

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.

Global Participation in Research

- **n=40,460 participants**
- **From 151 countries**

Results Weighted by Identity

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

Results Weighted by Generation

33%	33%	33%
Millennials	**Generation X**	**Baby Boomers**
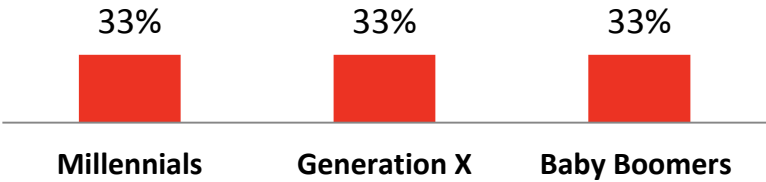
FIELDED IN ENGLISH, SPANISH, FRENCH AND HUNGARIAN
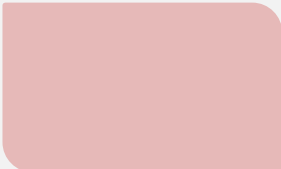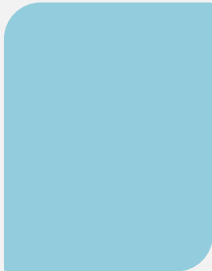
Percentages may not add up to 100% in some places due to rounding or multiple selections allowed.

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

In partnership with **Rivendell**

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 - GFLGLCC
- Greg in Hollywood
- Grindr
- GSBA / Travel Gay Seattle
- GSHRadio
- Guide Arc enc iel 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.
- Infolettre 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

Special thanks to our translation partners!

humen media group | **fugues** güíde zíP décorhomme AU SERVICE DES COMMUNAUTÉS GLBT DEPUIS 1984 | **The Rainbow Times** NEW ENGLAND'S LARGEST LGBTQ NEWSPAPER SINCE 2006

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

1

**Impact of
Outreach
to the LGBTQ
Community**

**CMI's 12th Annual LGBTQ Community Survey® • June 2018
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

CMI's 12th Annual LGBTQ Community Survey® • June 2018
Among All LGBTQ Participants

"Corporations that support LGBTQ equality are more important than ever."

85% Agree

13% Neutral

2% Disagree

Base: All LGBTQ n=18,531

**CMI's 12th Annual LGBTQ Community Survey® • June 2018
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

CMI's 12th Annual LGBTQ Community Survey® • June 2018
Among All LGBTQ Participants

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

76% Agree
22% Neutral
2% Disagree
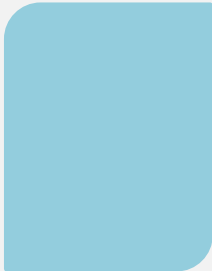
Base: All LGBTQ n=18,531

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How Corporations Fail in Their LGBTQ Outreach Approaches

Outreach to the Transgender/Gender-expansive Community:
The entire LGBTQ community feels more positively towards companies that are inclusive, and which outreach to the transgender/gender-expansive community. However, most companies fail to include the gender-expansive community in their outreach strategies, and it is noticed.

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

● Agree　　　● Neutral　　　● Disagree

Statement	Group	Agree	Neutral	Disagree
Corporations/companies do a good job outreaching to the transgender / gender-expansive community	Gender-Expansive	6%	25%	68%
	All LGBT	5%	31%	64%
I feel more positive towards companies that include transgender / gender-expansive community **imagery in their outreach communications**	Gender-Expansive	86%	11%	3%
	All LGBT	75%	20%	4%
I would be more likely to support and purchase from companies that market to and support the transgender / gender-expansive community	Gender-Expansive	88%	10%	2%
	All LGBT	74%	23%	4%

Base: Varies

Outreach to the Lesbian Community: When lesbians were asked about their evaluation of corporate America's outreach, their response was quite negative. Corporations that outreach with specific imagery and messages for LGBTQ women, and promote in media and events popular with lesbian and bisexual women, can have a big impact.

Do you agree or disagree with these statements? Please read the text carefully.
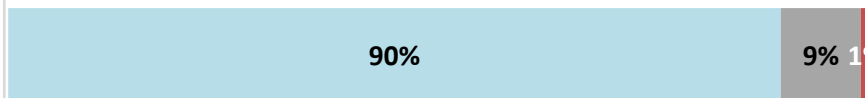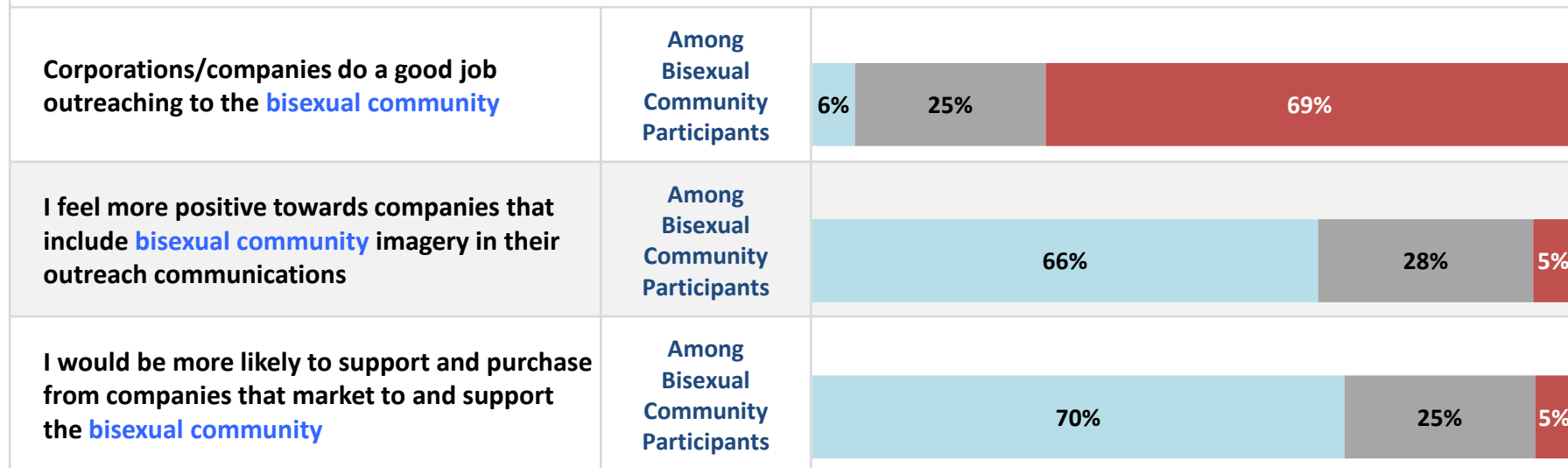
● Agree   ● Neutral   ● Disagree

Statement		Agree	Neutral	Disagree
Corporations/companies do a good job outreaching to the lesbian community	**Among Lesbian Participants**	5%	37%	58%
I feel more positive towards companies that include lesbian community imagery in their outreach communications	**Among Lesbian Participants**	90%	9%	1%
I would be more likely to support and purchase from companies that market to and support the lesbian community	**Among Lesbian Participants**	90%	9%	1%
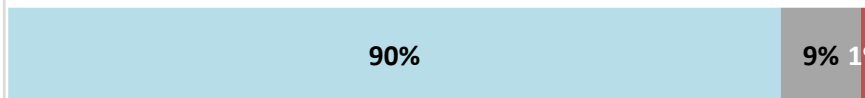
Base: Varies

Outreach to the Bisexual Community: Similarly, bisexuals feel that corporations do a bad job outreaching to the bisexual community. In fact, from CMI's observations, we have rarely seen specific outreach to the B of LGBTQ.

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

● Agree   ● Neutral   ● Disagree

Statement	Group	Agree	Neutral	Disagree
Corporations/companies do a good job outreaching to the bisexual community	**Among Bisexual Community Participants**	6%	25%	69%
I feel more positive towards companies that include bisexual community imagery in their outreach communications	**Among Bisexual Community Participants**	66%	28%	5%
I would be more likely to support and purchase from companies that market to and support the bisexual community	**Among Bisexual Community Participants**	70%	25%	5%

Base: Varies

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Outreach to the LGBTQ African American Community: The LGBTQ African American community also questions whether corporate America is being inclusive, and would respond positively if corporations would actively outreach to their community.

Asked to African American LGBTQ participants

Corporate America does a good job outreaching to the African American / Black Community (LGBTQ and non-LGBTQ)

Agree 8%   Neutral 24%   Disagree 67%

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
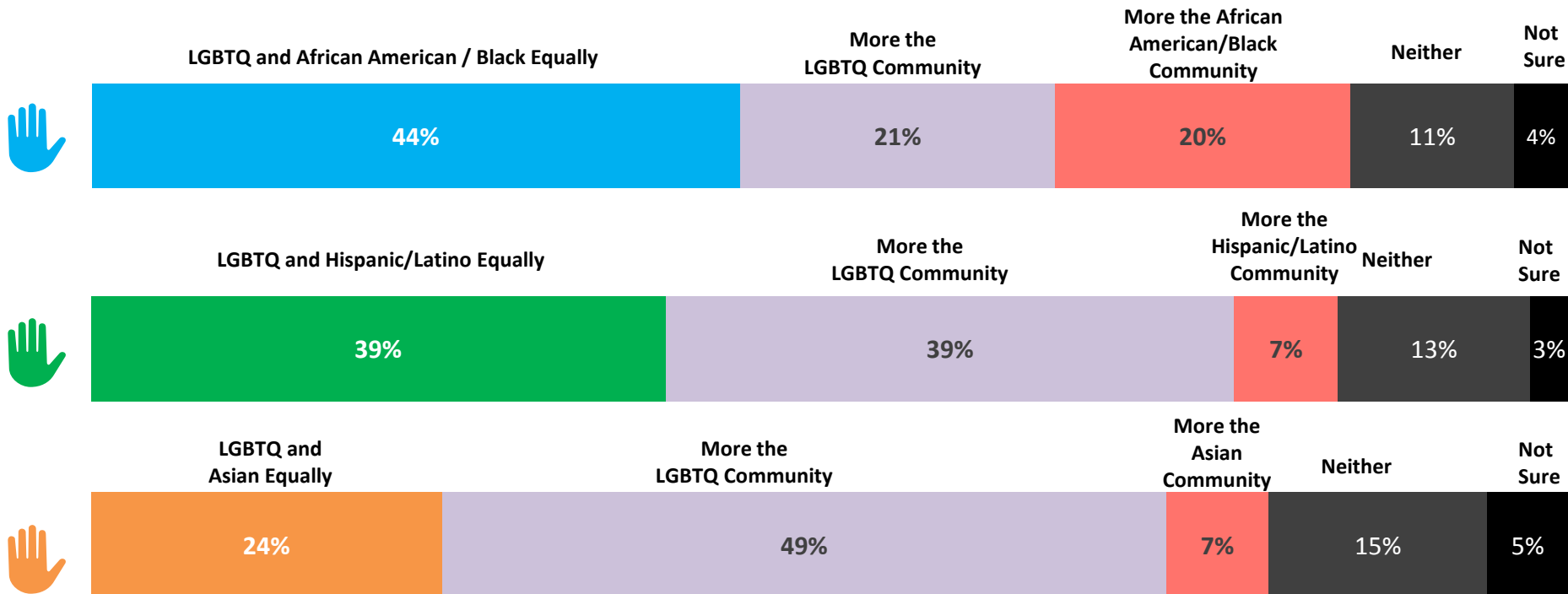
Agree 73%   Neutral 21%   Disagree 7%

I would be more likely to support and purchase from companies that market to and support the LGBTQ Black / African American community
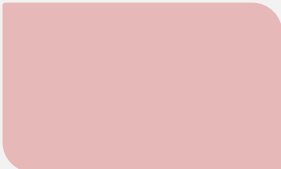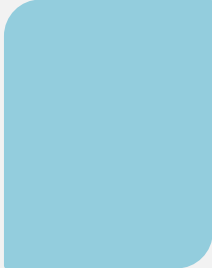
Agree 79%   Neutral 17%   Disagree 4%

Base: Varies

Outreach to the LGBTQ Latino Community: Similarly, the LGBTQ Latino community does not feel that corporate America is being inclusive of their community.

Asked to Latino
LGBTQ participants

Corporate America does a good job outreaching to the Latino / Hispanic Community (LGBTQ and non-LGBTQ)
Agree 12%   Neutral 42%   Disagree 46%

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%

Base: Varies

Support for the LGBTQ Asian Community: And continuing the same theme, the LGBTQ Asian community does not feel that corporate America does a good job outreaching to their community, either.

*Asked to Asian
LGBTQ participants*

**Corporate America does a good job outreaching to the
Asian Community (LGBTQ and non-LGBTQ)**

Agree 5%   Neutral 29%   Disagree 66%

**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

Intersectionality and Outreach Plans for Communities of Color: For meaningful outreach to LGBTQ communities of color, marketers need to consider the connection with both the LGBTQ community and racial/ethnic communities.

Do you connect more with the (community listed), the LGBTQ community, or both? Please mark the one that best applies.

LGBTQ and African American / Black Equally	More the LGBTQ Community	More the African American/Black Community	Neither	Not Sure
44%	21%	20%	11%	4%

LGBTQ and Hispanic/Latino Equally	More the LGBTQ Community	More the Hispanic/Latino Community	Neither	Not Sure
39%	39%	7%	13%	3%

LGBTQ and Asian Equally	More the LGBTQ Community	More the Asian Community	Neither	Not Sure
24%	49%	7%	15%	5%

Base: African American / Black n=1,050; Hispanic/Latino n=1,413; Asian n=484

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3 **LGBTQ Health and Exercise**

Understanding LGBTQ Health Concerns: Nothing is more personal than individual health. Understanding the health concerns of a community can give organizations deeper insight into their concerns, sensitivities, and motivations. The top three overall LGBTQ health concerns are depression/mental health, body weight, and losing or not having access to health insurance. However, there are significant demographic differences by gender and generation (see following slides).
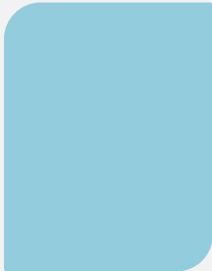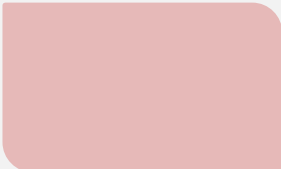
Which of the following health and injury issues are you most concerned about for yourself, personally? Please limit your choices to those that are of most concern to you.	USA ALL LGBT
Depression / mental health concerns	**46%**
Body Weight	**45%**
Losing or not having access to health insurance	**39%**
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: Among LGBTQ Millennials (of all genders), depression and mental health is by far the biggest health concern. For Generation X and Baby Boomers, body weight is the top concern. The top concerns (over 20%) for each generation are shaded in pink.

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%
Death or injury from gun violence	19%	14%	13%
HIV/AIDS	18%	16%	14%
Death or injury from car accident	18%	13%	10%
Heart disease	17%	26%	30%
Diabetes	16%	19%	23%
Alcohol use	15%	10%	7%
Alzheimer's disease	13%	18%	28%
Asthma or respiratory diseases	9%	10%	12%
Tobacco use / smoking	9%	10%	6%
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:
Among gay and bisexual men, body weight is the top concern and HIV rises to a top 5 concern. For lesbian and bisexual women and the gender-expansive community, depression and mental health is the top concern. Death or injury by gun violence is especially of concern to the gender-expansive community. The top five concerns by generation are shaded in pink.

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%
Cancer	32%	31%	23%
HIV/AIDS	30%	2%	13%
Heart disease	28%	21%	21%
Sexually transmitted diseases	25%	5%	15%
Alzheimer's disease	21%	19%	16%
Diabetes	20%	19%	19%
Death or injury from gun violence	15%	15%	21%
Stroke	15%	12%	13%
Alcohol use	13%	9%	9%
Death or injury from car accident	11%	15%	15%
Tobacco use / smoking	10%	6%	9%

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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Top 4 Health Concerns By 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.	Gay and Bisexual Men			Lesbian and Bisexual Women			Gender-Expansive		
	Millennials	Generation X	Baby Boomers	Millennials	Generation X	Baby Boomers	Millennials	Generation X	Baby Boomers
Body Weight	49%	49%	41%	37%	50%	45%	35%	40%	46%
Depression / mental health	50%	39%	30%	70%	46%	31%	82%	57%	40%
Cancer		33%	34%	29%	32%	32%	23%	23%	
HIV/AIDS	35%	29%							
Heart disease		29%	34%		23%	27%		23%	29%
Sexually transmitted diseases	37%								
Alzheimer's disease						27%			
Diabetes									25%
Death or injury from gun violence							27%		
Death or injury from car accident				21%					

Note: Concerns about the loss of health insurance was not included on this list.

Exercise Activities in Past 30 Days by Gender and Generation

In which sports/exercise did you participate in the past 30 days? (Please mark all that apply)	Gender			Generation		
	Gay & Bisexual Men	**Lesbians & Bisexual Women**	**Gender-Expansive**	**Millennials**	**Generation X**	**Baby Boomers**
Walking	69%	75%	69%	71%	72%	73%
Using cardiovascular equipment	34%	28%	22%	33%	32%	27%
Weightlifting	31%	20%	19%	29%	26%	20%
Hiking	22%	25%	24%	28%	23%	18%
Yoga	14%	24%	19%	25%	19%	13%
Running	20%	16%	15%	31%	16%	6%
Cycling	16%	16%	15%	17%	16%	14%
Swimming	14%	12%	11%	11%	14%	13%
Basketball	1%	3%	3%	3%	3%	1%
Golfing	2%	3%	2%	1%	3%	3%
Tennis	3%	2%	1%	2%	3%	2%
Aerobics classes (of any kind)	7%	9%	4%	9%	7%	6%
Crossfit classes or routine	8%	7%	4%	8%	8%	6%
Other	6%	12%	12%	12%	8%	8%
None of the above	14%	11%	15%	10%	13%	15%

Base: 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

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LGBTQ Social and Political Concerns

USA vs. Canada, LGBTQ-friendly Perceptions of Country:
98% of LGBTQ Canadians feel that they live in an LGBTQ-friendly country vs. 57% of LGBTQ United States residents. We also observed differences on the state/province level, but not as pronounced. Interestingly, the differences between the two countries are not as pronounced on the local level, indicating that there is some self-selection by LGBTQ U.S. residents regarding the type of community in which they live.

		USA		Canada	
Do you agree or disagree with these statements?		**2018**	**2017**	**2018**	**2017**
I live in an LGBTQ-friendly city, town, or community.	Strongly Agree	41%	**40%**	47%	**48%**
	Somewhat Agree	43%	**42%**	43%	**42%**
	Somewhat Disagree	12%	**13%**	8%	**9%**
	Strongly Disagree	4%	**5%**	2%	**2%**
I live in an LGBTQ-friendly state or province.	Strongly Agree	32%	**30%**	47%	**47%**
	Somewhat Agree	38%	**36%**	46%	**44%**
	Somewhat Disagree	20%	**20%**	7%	**8%**
	Strongly Disagree	11%	**13%**	1%	**2%**
I live in an LGBTQ-friendly country.	Strongly Agree	5%	**4%**	62%	**62%**
	Somewhat Agree	52%	**51%**	36%	**37%**
	Somewhat Disagree	35%	**36%**	2%	**1%**
	Strongly Disagree	8%	**8%**	1%	**0%**

Bases: USA 2017 n=17,420; USA 2018 n=18,743; Canada 2017 n=2,131; Canada 2018 n=2,170

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Social and Political Priorities: The social and political priorities of the LGBTQ community are quite different than the general population in the United States. And even within LGBTQ, there are major differences by demographics.

Which of the following political and social issues are you most concerned about? Please limit your choices to those that are of most concern to you.	USA ALL LGBTQ	Major LGBTQ Demographic Differences
LGBTQ discrimination	76%	High for all demographics
Affordable healthcare	66%	High for all demographics
Racial discrimination	54%	81% Black / 60% Latino / 50% White
Climate change	53%	55% White / 48% Latino / 40% Black
Women's equality in the workplace	44%	63% Women / 45% Gender-Expansive / 25% Men
Affordable housing	40%	54% Black / 49% Latino / 37% White
Marriage equality	39%	
Poverty	39%	
Sexual harassment	34%	44% Women / 43% Gender-Expansive / 22% Men
Immigration reform	29%	42% Latino / 27% White / 24% Black
Fake news	27%	34% Men / 25% Gender-Expansive / 21% Women
Post-truth politics	24%	
Cyber security	22%	
Foreign wars or military conflicts	21%	
Street / neighborhood violence	20%	34% Black / 24% Latino / 18% White
High taxes	19%	
Unemployment	16%	
Terrorism	16%	
Government regulation of business	9%	
Inflation	9%	

Base: All LGBTQ n=18,743

Priorities for the LGBTQ Movement for the Next 10 Years by Gender

What are your priorities for the LGBTQ movement for the next 10 years? Please check the LGBTQ causes that motivate you to volunteer, donate, support, get involved, etc.	Country	USA Identity Breakout		
	USA ALL LGBTQ	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender-Expansive
LGBTQ youth, anti-bullying and/or teen suicide issues	**62%**	60%	64%	63%
Stopping anti-LGBTQ "religious freedom" legislation	**58%**	59%	58%	60%
Supporting LGBTQ-friendly political candidates	**56%**	58%	55%	48%
LGBTQ workplace equality	**54%**	53%	54%	57%
Supporting LGBTQ political candidates	**52%**	54%	52%	48%
Transgender rights	**44%**	33%	48%	82%
Protecting and expanding marriage equality	**43%**	45%	43%	32%
Ethnic / racial equality within the LGBTQ community	**42%**	36%	45%	50%
Expanding LGBTQ senior care	**41%**	41%	41%	39%
HIV education and care	**33%**	45%	21%	33%
Reduce the social & legal obstacles of LGBTQ parenting	**32%**	29%	35%	33%
Expanding LGBTQ roles, visibility and influence in rural areas	**29%**	29%	28%	34%
Protections for LGBTQ immigrants to your country	**28%**	27%	28%	35%
International LGBTQ rights	**27%**	30%	24%	30%
Expanding LGBTQ roles and influence in religious communities	**18%**	17%	18%	21%
Expanding LGBTQ roles and influence in sports communities	**13%**	15%	12%	11%

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

Priorities for the LGBTQ Movement for the Next 10 Years by Generation

What are your priorities for the LGBTQ movement for the next 10 years? Please check the LGBTQ causes that motivate you to volunteer, donate, support, get involved, etc.	Country	USA Generation Breakout		
	USA ALL LGBT	Millennials	Generation X	Baby Boomers
LGBTQ youth, anti-bullying and/or teen suicide issues	62%	66%	61%	58%
Stopping anti-LGBTQ "religious freedom" legislation	58%	58%	57%	60%
Supporting LGBTQ-friendly political candidates	56%	50%	56%	62%
LGBTQ workplace equality	54%	57%	54%	50%
Supporting LGBTQ political candidates	52%	51%	50%	56%
Transgender rights	44%	58%	41%	34%
Protecting and expanding marriage equality	43%	38%	46%	46%
Ethnic / racial equality within the LGBTQ community	42%	55%	37%	33%
Expanding LGBTQ senior care	41%	24%	37%	61%
HIV education and care	33%	38%	31%	30%
Reduce the social & legal obstacles of LGBTQ parenting	32%	40%	30%	26%
Expanding LGBTQ roles, visibility and influence in rural areas	29%	35%	28%	24%
Protections for LGBTQ immigrants to your country	28%	35%	24%	26%
International LGBTQ rights	27%	35%	24%	24%
Expanding LGBTQ roles and influence in religious communities	18%	19%	16%	19%
Expanding LGBTQ roles and influence in sports communities	13%	16%	13%	12%

Base: All LGBTQ n=18,743; Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

Slide 1 of 3

Being Comfortable in Different Spaces: A new question concept in 2018, we wanted the test how comfortable LGBTQ community members feel in different types of environments (series of 3 slides).

Most LGBTQ community members are comfortable in the five environments tested, but sometimes with hesitancy. While results do vary depending on the environment, and segment within LGBTQ, we identified some trends. Bisexual men are the most comfortable in non-LGBTQ specific environments and Gender-expansive community members expressed the most discomfort in these settings. Professional sporting events should note that not an insignificant number of LGBTQ community members report at least some discomfort attending their events.

To what degree do you feel comfortable and belonging in these types of spaces?

Slide 1 of 3: A professional sports arena watching a non-LGBTQ sporting event				
	Fully comfortable	**Somewhat comfortable**	**Some discomfort**	**Not comfortable**
Gay Men	43%	33%	17%	7%
Lesbian Women	44%	35%	15%	6%
Bisexual Men	56%	25%	12%	7%
Bisexual Women	39%	32%	19%	9%
Gender-Expansive	26%	29%	28%	17%
Transgender Identities	24%	30%	29%	17%
Non-binary Identities	29%	29%	26%	17%

Base: Cisgender Gay Men n=12,177; Cisgender Lesbian Women n=3,070; Cisgender Bisexual Men n=846; Cisgender Bisexual Women n=1131;Gender-expansive n=1,604; Transgender Identities n=862; Non-binary Identities n=742

Slide 2 of 3: To what degree do you feel comfortable and belonging in these types of spaces?

An event with mostly LGBTQ community members			
	Fully comfortable	**Somewhat comfortable**	**Some discomfort**	**Not comfortable**
Gay Men	81%	15%	3%	1%
Lesbian Women	85%	13%	2%	0%
Bisexual Men	61%	28%	9%	2%
Bisexual Women	70%	26%	3%	1%
Gender-Expansive	74%	23%	3%	1%
Transgender Identities	73%	24%	2%	1%
Non-binary Identities	75%	22%	3%	1%

An event with mostly straight or non-LGBTQ community members			
	Fully comfortable	**Somewhat comfortable**	**Some discomfort**	**Not comfortable**
Gay Men	53%	37%	9%	1%
Lesbian Women	42%	42%	14%	2%
Bisexual Men	61%	29%	7%	2%
Bisexual Women	47%	39%	13%	1%
Gender-Expansive	29%	41%	24%	5%
Transgender Identities	27%	41%	26%	6%
Non-binary Identities	32%	41%	22%	5%

Base: See previous slide
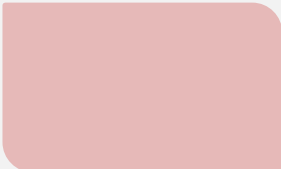
Slide 3 of 3: To what degree do you feel comfortable and belonging in these types of spaces?

A restaurant in a big city			
	Fully comfortable	**Somewhat comfortable**	**Some discomfort**	**Not comfortable**
Gay Men	84%	15%	1%	0%
Lesbian Women	74%	24%	2%	1%
Bisexual Men	77%	18%	4%	1%
Bisexual Women	74%	22%	2%	1%
Gender-Expansive	57%	34%	8%	2%
Transgender Identities	52%	37%	10%	2%
Non-binary Identities	64%	30%	5%	1%

A restaurant at a truck/gas stop along the highway			
	Fully comfortable	**Somewhat comfortable**	**Some discomfort**	**Not comfortable**
Gay Men	36%	38%	21%	5%
Lesbian Women	22%	33%	34%	11%
Bisexual Men	52%	30%	13%	5%
Bisexual Women	24%	33%	32%	11%
Gender-Expansive	22%	28%	33%	17%
Transgender Identities	21%	29%	33%	18%
Non-binary Identities	24%	28%	33%	16%

Base: See previous slide
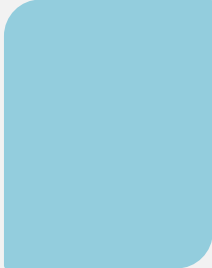
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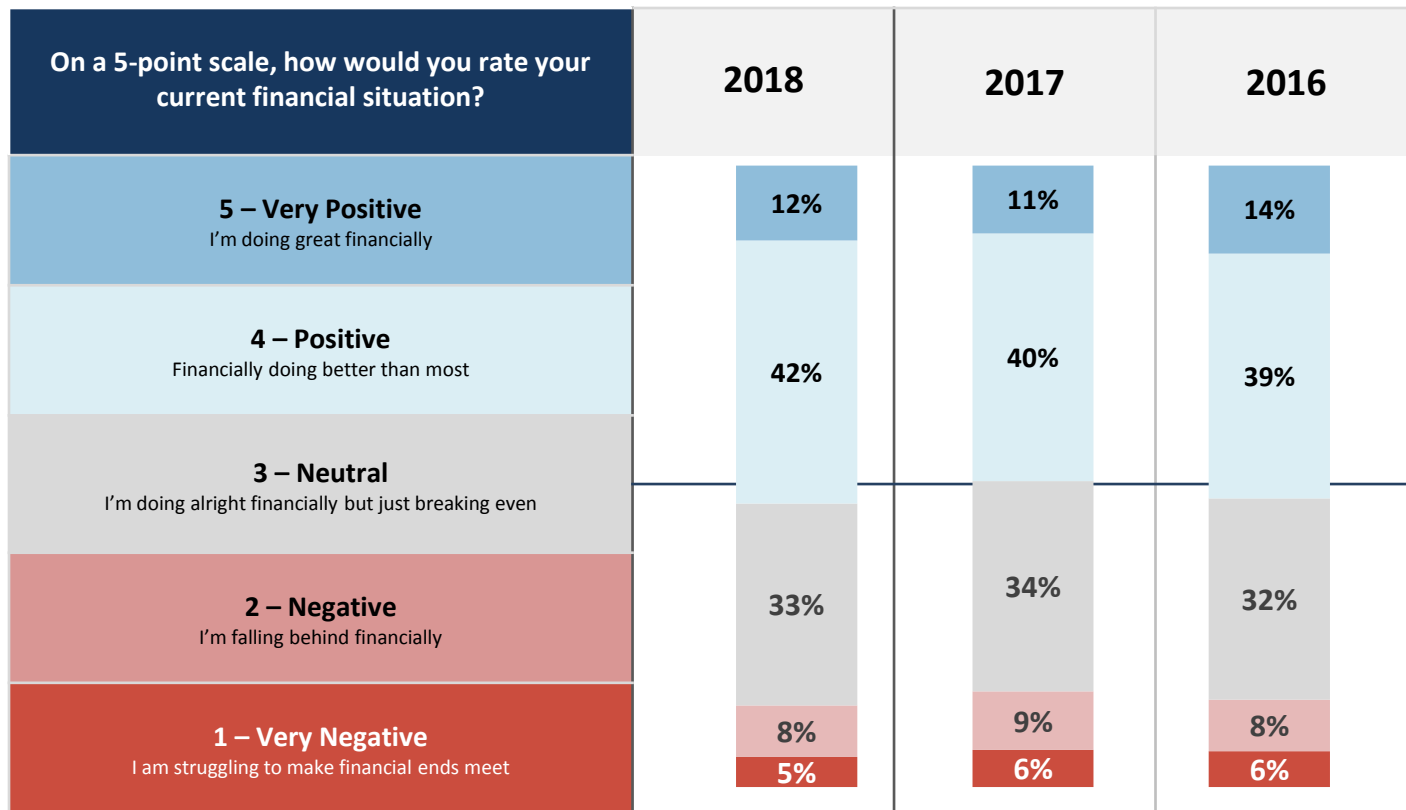**CMI's 12th Annual LGBTQ Community Survey®
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5 **Terminology**

2018 Favorability of Terms by Generation: LGBT and LGBTQ are virtually equally favorable. LGBTQ is now firmly in the positive, making gains vs. previous years. LGBT+ is growing in popularity, 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…	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 Gender: By gender, there are some more clear distinctions. LGBT is favored by gay and bisexual men vs. 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

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.

% 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...	Millennials	Gen X	Boomers
	LGBT-friendly	79%	79%	79%
	LGBT-welcoming	62%	67%	71%
	Gay-friendly	59%	72%	77%

% 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
	LGBT-friendly	82%	74%	76%
	LGBT-welcoming	69%	65%	64%
	Gay-friendly	67%	49%	75%

Base: Varies

Sexual Orientation Terms and LGBTQ Women: Sexual orientation terms are becoming more fluid within the women's community. Over recent years on this survey, we've observed that more women are selecting multiple identities. This question helps organizations understand terms that LGBTQ women use to describe themselves. Of note, 72% of Baby Boomer women were very likely to use "lesbian," compared to only 42% of the Millennial women. Also interesting is the percentage of women who picked an identity on the sexual orientation question, but later said that they do not use that term to describe themselves.

You said that you identify as a lesbian, gay woman, bisexual and female, or pansexual and female. When you think about how you identify, how likely are you to use these terms to describe yourself?

		Women Selected Lesbian on Survey	Women Selected Bisexual on Survey	Women Selected Pansexual on Survey
Lesbian	Very likely	69%	16%	18%
	Sometimes	27%	32%	28%
	Not likely or never	5%	52%	55%
Gay	Very likely	66%	27%	30%
	Sometimes	29%	43%	42%
	Not likely or never	5%	30%	28%
Gay Woman	Very likely	38%	17%	19%
	Sometimes	36%	33%	34%
	Not likely or never	26%	49%	47%
Bisexual Woman	Very likely	3%	69%	46%
	Sometimes	10%	28%	36%
	Not likely or never	87%	3%	17%
Pansexual Woman	Very likely	1%	7%	43%
	Sometimes	5%	29%	46%
	Not likely or never	94%	64%	11%

Base: Varies

Terms for Communities of Color: We asked about terms often used to describe communities of color, from the LGBTQ perspective. The results did not give clear direction.

Among Latino/a/x/Hispanic LGBTQ
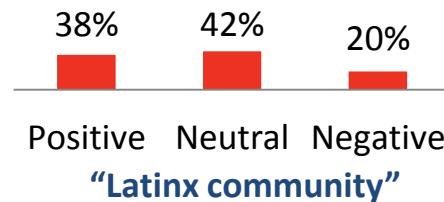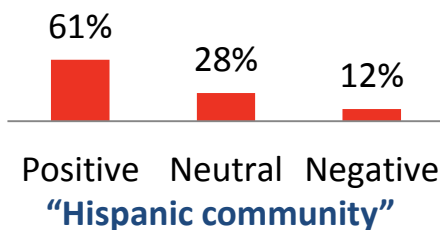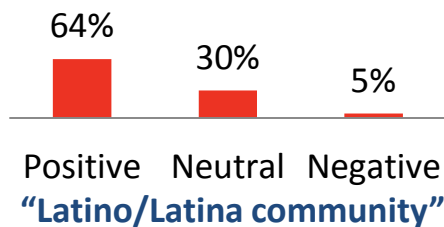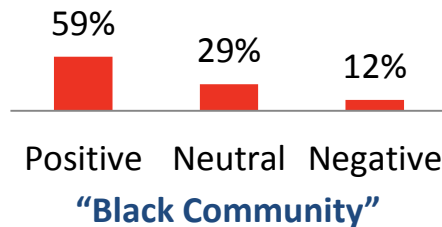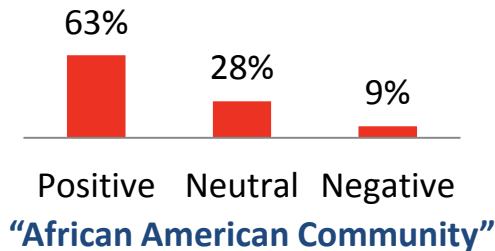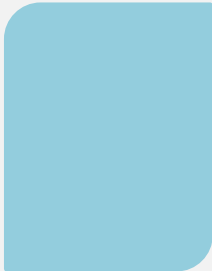
64% Positive 30% Neutral 5% Negative
"Latino/Latina community"

61% Positive 28% Neutral 12% Negative
"Hispanic community"

38% Positive 42% Neutral 20% Negative
"Latinx community"

Among Black/African American LGBTQ

63% Positive 28% Neutral 9% Negative
"African American Community"

59% Positive 29% Neutral 12% Negative
"Black Community"

Base: Varies

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Economic Confidence and Purchasing

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 TRANSITIONAL APPAREL 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

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

On a 5-point scale, how would you rate your current financial situation?	2018	2017	2016
5 – Very Positive I'm doing great financially	12%	11%	14%
4 – Positive Financially doing better than most	42%	40%	39%
3 – Neutral I'm doing alright financially but just breaking even			
2 – Negative I'm falling behind financially	33%	34%	32%
1 – Very Negative I am struggling to make financial ends meet	8% 5%	9% 6%	8% 6%

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

LGBTQ Travel Purchases Over the 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 Beverage Consumption Over Past 7 Days By Gender And Generation

What types of drinks have you consumed in the past 7 days?	Country	USA Gender Breakout			USA Generation Breakout		
	USA ALL LGBT	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender-Expansive	Millennials	Generation X	Baby Boomers
Coffee	70%	69%	71%	65%	68%	69%	72%
Bottled water	59%	62%	57%	54%	55%	63%	59%
Soda	49%	53%	45%	49%	48%	53%	45%
Iced tea	38%	42%	35%	38%	31%	41%	42%
Beer	30%	29%	31%	24%	39%	30%	21%
Clear spirits (e.g. Vodka, Gin)	29%	37%	23%	19%	33%	30%	23%
Red wine	28%	33%	25%	21%	28%	28%	29%
White wine	22%	25%	19%	14%	23%	21%	21%
Dark spirits (e.g. Bourbon, Whiskey)	19%	22%	16%	17%	23%	18%	15%
Sports or energy drink	16%	18%	13%	16%	19%	18%	10%
Light beer	10%	11%	8%	6%	12%	9%	7%
None of the above	3%	2%	3%	4%	3%	2%	2%

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
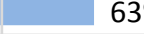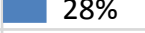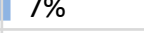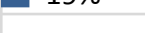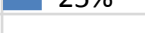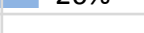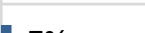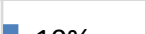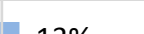
LGBTQ Major Purchases Over Past 12 Months By Gender And Generation

Have you (or you and your partner) purchased any of the following major items during the past 12 months? (Please mark all that apply)	Country USA ALL LGBT	USA Gender Breakout			USA Generation Breakout		
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender-Expansive	Millennials	Generation X	Baby Boomers
A new smartphone	**49%**	53%	46%	44%	48%	54%	46%
Major piece of furniture	**28%**	30%	26%	21%	29%	30%	23%
Television or electronic entertainment device for home	**27%**	32%	23%	25%	24%	31%	27%
A new laptop computer for personal use	**21%**	22%	20%	21%	20%	22%	21%
Purchased (or leased) a new automobile	**20%**	21%	20%	16%	17%	23%	21%
A new tablet computer for personal use	**19%**	20%	17%	17%	12%	22%	22%
Major kitchen appliances	**18%**	20%	16%	13%	13%	20%	19%
Video game console	**9%**	10%	8%	12%	16%	10%	2%
A new desktop computer for personal use	**7%**	9%	5%	7%	5%	7%	9%
None of the above	**20%**	18%	22%	24%	21%	17%	22%

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

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Which of the following banking or financial services do you use or own? (Please mark all that apply.)

	Millennials	Generation X	Baby Boomers
Checking account	96%	95%	96%
Money market, savings or CD account	52%	54%	57%
Retirement account of any kind (e.g., 401K, IRA)	49%	67%	63%
Student loans	48%	28%	7%
Credit card (non-rewards-based)	47%	51%	47%
Premium-level or rewards-based credit card	45%	50%	51%
Online brokerage account / stock purchases	19%	25%	26%
Home mortgage	17%	47%	44%
Tax advice or tax preparation	17%	22%	25%
Financial planning services	7%	16%	24%
Home improvement or home equity loan	2%	10%	13%
Business loans	1%	3%	2%
None of the above	2%	3%	2%

By company or independent financial planner.

Base: Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

LGBTQ Insurance Ownership By Generation

Which of the following types of insurance do you have, if any? (Please mark all that apply)	USA ALL LGBTQ	USA Generation Breakout		
		Millennials	**Generation X**	**Baby Boomers**
Health insurance	**87%**	86%	88%	88%
Auto / car / motorcycle insurance	**81%**	70%	85%	89%
Dental insurance	**66%**	67%	72%	60%
Life insurance	**50%**	40%	60%	50%
Home owners insurance	**49%**	20%	57%	70%
Renters insurance	**25%**	34%	24%	16%
Long-term care insurance	**13%**	7%	15%	18%
Identity theft insurance	**9%**	5%	10%	11%
Business insurance	**7%**	3%	9%	9%
Pet insurance	**7%**	6%	8%	6%
None of the above	**3%**	5%	2%	2%

Base: All LGBTQ n=18,743; Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

LGBTQ Dining Out During Past 7 Days

In the past 7 days, how many days did you eat meals in the following ways?	0	1	2	3-4	5-7
Dinner at a restaurant	27%	27%	25%	17%	4%
Lunch at a restaurant	37%	26%	20%	14%	4%
Breakfast at restaurant	65%	22%	8%	3%	1%
Food delivery or take out	38%	28%	19%	11%	3%

Base: Varies

LGBT Community and Pets

Do you care for a pet or companion animal at home?	USA ALL LGBT	Gay and Bisexual Men	Lesbians & Bisexual Women	Gender Expansive
Yes, I have a pet or companion animals at home	67%	60%	74%	66%
One or more dogs	41%	38%	45%	34%
One or more cats	33%	24%	42%	38%
Other type(s) of pet or animal	10%	9%	11%	12%
No, I have no pets or companion animals at home	33%	40%	26%	34%

USA Gen Pop Pet in Home Rate is 68%

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

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

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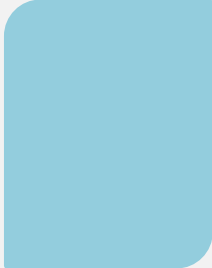
**LGBTQ Media
and Organizations**

LGBTQ Media Interaction (Past 12 Months)

Has your interaction with LGBTQ media (newspapers, websites, etc.) changed over the past 12 months?		USA ALL LGBT	USA Generation Breakout		
			Millennials	Generation X	Baby Boomers
Visiting LGBTQ websites / blogs	Increased	36%	47%	32%	28%
	Same	58%	48%	61%	66%
	Decreased	6%	5%	7%	6%
Reading LGBTQ email newsletters	Increased	20%	23%	18%	19%
	Same	71%	70%	71%	73%
	Decreased	9%	7%	10%	9%
Using LGBTQ mobile apps	Increased	13%	19%	13%	9%
	Same	75%	71%	75%	78%
	Decreased	12%	10%	12%	14%
Reading LGBTQ Newspapers	Increased	12%	14%	11%	10%
	Same	77%	78%	75%	77%
	Decreased	11%	8%	14%	13%
Reading LGBTQ Magazines	Increased	12%	14%	12%	9%
	Same	77%	78%	75%	78%
	Decreased	11%	7%	14%	13%

Base: Varies

Corporations cannot 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 LGBT	Millennials	Generation X	Baby Boomers
Advertisement in the LGBTQ media	49%	48%	49%	50%
Article or news story in the media	47%	48%	46%	48%
Sponsorship of LGBTQ charity events or organizations	41%	36%	42%	45%
LGBTQ-inclusive ads in the mainstream media	40%	38%	41%	41%
From an LGBTQ friend	36%	44%	34%	29%
From Facebook or other social media	35%	39%	37%	31%
HRC Corporate Equality Index score	32%	27%	37%	31%
From a blogger or influencer posting	16%	22%	15%	10%
From a straight friend	6%	7%	6%	4%
From family	5%	5%	5%	4%
Other	5%	5%	6%	5%
None of the above	14%	12%	14%	15%

Base: All LGBTQ n=18,743; Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

Types of LGBTQ Events Attended by Generation

In the past 12 months, have you attended any of the following LGBTQ community events? (Please mark all that apply)	ALL LGBTQ	Millennials	Generation X	Baby Boomers
LGBTQ Pride event	52%	57%	52%	47%
LGBTQ cultural, arts or film event	27%	29%	26%	27%
Women's event (not lesbian-specific)	16%	19%	14%	15%
LGBTQ professional association meeting or conference	14%	15%	15%	12%
Lesbian community event	10%	9%	9%	11%
LGBTQ circuit party / dance event	9%	14%	8%	5%
Transgender community event	8%	8%	8%	7%
LGBTQ theme event (like "Gay Days" in Orlando)	7%	9%	7%	4%
Leather community event	6%	6%	7%	6%
Bear community event	6%	6%	7%	6%
LGBTQ families event	5%	4%	6%	4%
Black/African American LGBTQ Pride event	4%	4%	4%	3%
LGBTQ sports tournament	3%	4%	4%	2%
Latino LGBTQ Pride event	2%	2%	2%	2%
"Imperial Court" event	2%	1%	2%	2%
Bisexual community event	1%	2%	2%	1%
LGBTQ rodeo	1%	0%	1%	1%
LGBTQ ski event	1%	1%	1%	0%
None of the above	32%	29%	33%	36%

Base: All LGBTQ n=18,743; Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

Types of LGBTQ Events Attended by Gender

In the past 12 months, have you attended any of the following LGBTQ community events? (Please mark all that apply)	ALL LGBTQ	Gay and Bisexual Men	Lesbian and Bisexual Women	Gender-Expansive
LGBTQ Pride event	52%	50%	54%	52%
LGBTQ cultural, arts or film event	27%	26%	28%	29%
Women's event (not lesbian-specific)	16%	2%	30%	12%
LGBTQ professional association meeting or conference	14%	13%	14%	18%
Lesbian community event	10%	1%	20%	6%
LGBTQ circuit party / dance event	9%	9%	8%	9%
Transgender community event	8%	3%	7%	35%
LGBTQ theme event (like "Gay Days" in Orlando)	7%	8%	6%	7%
Leather community event	6%	10%	2%	7%
Bear community event	6%	12%	1%	4%
LGBTQ families event	5%	4%	5%	9%
Black/African American LGBTQ Pride event	4%	3%	4%	5%
LGBTQ sports tournament	3%	4%	3%	2%
Latino LGBTQ Pride event	2%	2%	2%	3%
"Imperial Court" event	2%	2%	1%	2%
Bisexual community event	1%	1%	2%	3%
LGBTQ rodeo	1%	1%	0%	1%
LGBTQ ski event	1%	1%	0%	1%
None of the above	32%	37%	28%	30%
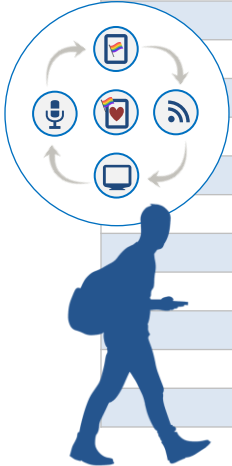
Base: All LGBTQ n=18,743; Cisgender Gay & Bisexual Men n=12,934;
Cisgender Lesbian & Bisexual Women n=4,205; Gender-expansive n=1,604

Other Types of LGBTQ Community Interactions (Past Year)

In the past 12 months, have you viewed or participated in any of the following? (Please mark all that apply)	ALL LGBTQ	Millennials	Generation X	Baby Boomers
Watched an LGBTQ-inclusive TV show	74%	85%	76%	61%
Watched a film with majority LGBTQ characters	67%	74%	68%	59%
Attended an LGBTQ Pride event	52%	57%	52%	47%
Visited a bar / nightclub for the LGBTQ community	50%	60%	52%	39%
Donated to LGBTQ organization(s)	49%	44%	49%	53%
Visited an neighborhood because it is LGBTQ-popular	40%	49%	40%	31%
Attended an LGBTQ organization fund-raiser, gala, etc.	27%	23%	29%	30%
Volunteered at LGBTQ organization(s)	22%	21%	22%	22%
Attended an LGBTQ film festival	12%	9%	13%	14%
None of the above	7%	4%	7%	11%

Base: All LGBTQ n=18,743; Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

National LGBTQ Media Interaction (Past 30 Days) by Gender

In the past 30 days, have you viewed or listened to any of the following...? (Please mark all that apply)	USA Gender Breakout		
	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive
Read an LGBTQ news website	67%	58%	69%
Watched an LGBTQ-themed movie	61%	54%	55%
Read an LGBTQ entertainment website	51%	45%	45%
Read an LGBTQ blogger	44%	36%	48%
Viewed an LGBTQ YouTube channel	43%	32%	49%
Used an LGBTQ dating app	38%	11%	23%
Read a national LGBTQ magazine	36%	24%	27%
Read an LGBTQ-related email newsletter	28%	31%	38%
Read an LGBTQ-themed book (hard copy or digital)	27%	34%	36%
Watched an LGBTQ-specific television channel	24%	12%	16%
Listened to an LGBTQ audio podcast	15%	21%	21%
Used an LGBTQ mobile news app	11%	4%	9%
Used an LGBTQ mobile entertainment app	8%	3%	5%
Listened to an LGBTQ-specific radio channel	6%	3%	5%
None of the above	8%	12%	7%

Base: Cisgender Gay & Bisexual Men n=12,934;
Cisgender Lesbian & Bisexual Women n=4,205; Gender-Expansive n=1,604

National LGBTQ Media Interaction (Past 30 Days) by Generation

In the past 30 days, have you viewed or listened to any of the following...? (Please mark all that apply)	USA Generation Breakout		
	Millennials	Generation X	Baby Boomers
Read an LGBTQ news website	69%	62%	59%
Watched an LGBTQ-themed movie	63%	56%	52%
Read an LGBTQ entertainment website	61%	46%	35%
Viewed an LGBTQ YouTube channel	54%	34%	27%
Read an LGBTQ blogger	52%	41%	29%
Read an LGBTQ-themed book (hard copy or digital)	38%	27%	26%
Used an LGBTQ dating app	34%	23%	16%
Listened to an LGBTQ audio podcast	31%	16%	8%
Read an LGBTQ-related email newsletter	30%	29%	32%
Read a national LGBTQ magazine	23%	31%	35%
Watched an LGBTQ-specific television channel	20%	18%	15%
Used an LGBTQ mobile entertainment app	6%	6%	4%
Used an LGBTQ mobile news app	6%	8%	8%
Listened to an LGBTQ-specific radio channel	5%	5%	5%
None of the above	7%	11%	12%
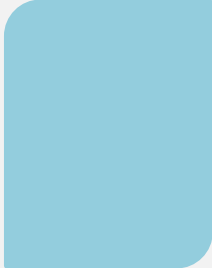
Base: Millennials n=4,982; Generation X n=5,453; Baby Boomers n=8,308

Social Media Interaction (Past 30 Days)

Do you have, and have actively used (at least once a week), any of these social media and dating websites / apps in the past 30 days? (Please mark all that apply)	USA Gender Breakout			USA Generation Breakout		
	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive	Millennials	Generation X	Baby Boomers
Facebook	79%	83%	80%	82%	82%	78%
YouTube	70%	60%	70%	75%	65%	55%
Instagram	46%	48%	39%	68%	47%	24%
Tumblr	39%	13%	28%	39%	24%	15%
Twitter	36%	35%	34%	42%	39%	25%
LinkedIn	30%	24%	21%	25%	31%	24%
Snapchat	20%	18%	16%	41%	12%	3%
Google+	19%	19%	18%	9%	20%	27%
Yelp	16%	17%	12%	16%	17%	14%
Pinterest	12%	20%	16%	15%	19%	14%
Reddit	10%	8%	11%	17%	7%	2%
Trip Advisor	10%	8%	5%	3%	9%	13%
Dating app designed for general population (non-LGBTQ focused)	7%	7%	9%	14%	5%	2%
Meetup	4%	8%	7%	4%	7%	8%
None of the above	3%	3%	3%	1%	2%	6%

Base: 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

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2017

Appendix:
Findings from
CMI's 11th Annual
LGBTQ Community Survey

There are too many topics for the LGBTQ Community Survey report to cover every year.

We're including some results from the previous year's survey report to help round out the data for our readers.

Download the full 2017 report at
www.communitymarketinginc.com

Relationship Status: In 2017, we continued to see increases in the number of participants who are married (up 4% from 2016). Also of note is that gay and bisexual men are more likely than lesbian and bisexual women to define themselves as single. Lesbian and bisexual women are more likely than gay and bisexual men to be married. Community members who identify as gender-expansive are more likely than gay and bisexual men to be in relationships. For the first time, CMI added the following options: Polyamorous relationship, and divorced from a same-sex spouse.

Which of the following best describes your current relationship status? (Please mark all that apply)	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender-Expansive
Single / not in a relationship	42%	27%	38%
In a relationship and living with partner (no legal status)	17%	18%	15%
In a relationship but not living with partner (dating)	9%	10%	11%
Legally married	26%	39%	31%
Civil union or registered domestic partner	2%	3%	2%
Engaged	2%	3%	3%
Widow / Widower	2%	1%	3%
Divorced from same-sex spouse	1%	2%	2%
Divorced from opposite-sex spouse	2%	3%	5%
Polyamorous relationship	2%	3%	7%

Bases: Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender-expansive n=1,345

Marriage Trends: We asked married participants how long ago they got married, as well as how long the period was between meeting and marriage. The results point to the surge in same-sex marriage over the past 5 years as various states, and then the nation, adopted marriage equality. The data also suggests a slowing of same-sex marriages after that surge, because couples who had been together for many years before marriage equality are now married. In 2016, Community Marketing & Insights along with WeddingWire, Inc., GayWeddings.com, and the Gay Wedding Institute published an extensive report on same-sex weddings, which is available for download at no charge at www.CMI.info.

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%

AMONG RECENTLY MARRIED (PAST 2 YEARS)

What was the period from the time you started dating until the time you got legally married?	
< 1 Year	5%
1-4 Years	30%
5-9 Years	21%
10+ Years	45%
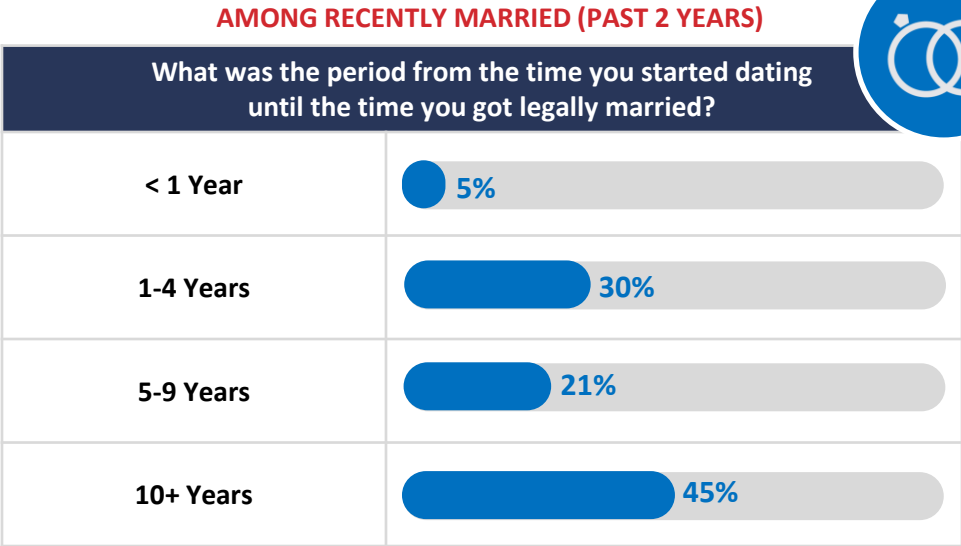
Prefer not to answer (.16%)

Bases: Married n=5,203; Recently Married (Past 2 Years) n=1,830

Relationships: As a new question in 2017, we wanted to explore and acknowledge that not all relationships are "binary;" a same-sex or opposite-sex couple. Many community members are in a relationship where at least one partner identifies as other than male or female.
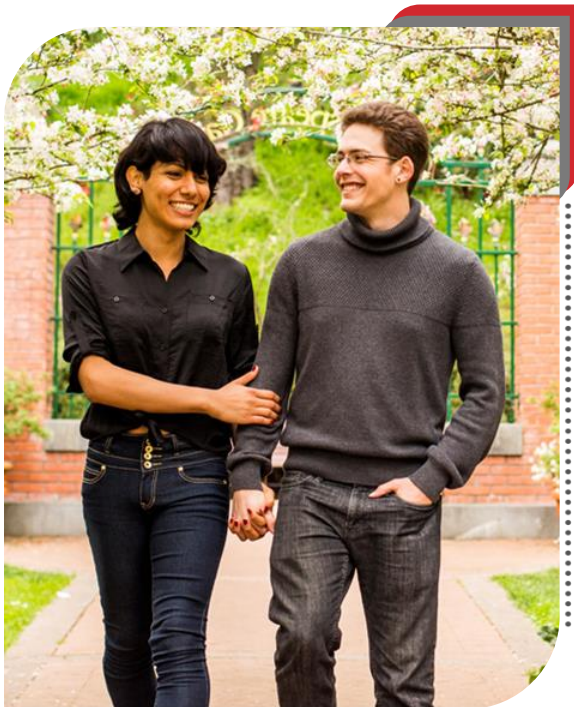
You indicated that you are in a relationship. How would you describe your relationship?	Lesbian Women	Bisexual Women	Gay Men	Bisexual Men	Gender-Expansive
Same-sex relationship	96%	47%	98%	33%	39%
Opposite-sex relationship	1%	40%	1%	60%	25%
Non-binary identified relationship (at least one partner identifies other than male or female)	2%	7%	<1%	5%	26%
Other	1%	6%	<1%	2%	9%

Bases (In a Relationship): Lesbian Women n=1,810; Bisexual Woman n=430; Gay Men n=5,675; Bisexual Men n=409; Gender-Expansive n=612

Parents & Children: Within the LGBTQ community, Generation X lesbian and bisexual women are the cohort most likely to be parents of a child under age 18. We also see higher percentages of parents among late-Millennials. Percentages of parents of children living at home were stable compared to 2016, however, that is likely to change in the future: About half of LGBTQ Millennials of all genders desire to have children in the future.

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 in my home.**	2%	6%	2%	11%	27%	4%	6%	15%	5%
Yes, children under age 18 **not living in my home.**	1%	2%	1%	1%	3%	1%	1%	5%	2%
Yes, children **over age 18.**	0%	6%	19%	0%	16%	34%	0%	13%	51%
No	97%	87%	78%	88%	58%	61%	92%	68%	43%
Prefer not to answer	0%	1%	0%	0%	1%	1%	1%	2%	1%

# of Children Under 18 Living at Home	Among All LGBTQ Parents of Children Under 18
1	56%
2	29%
3	10%
4+	5%

Do you want to have children in the future? (Please mark all that apply.)	Millennial+ Non-parents		
	Gay & Bi Men	Lesbian & Bi Women	Gender - Expansive
Yes, **in the next three years.**	11%	19%	10%
Yes, **four or more years from now.**	37%	35%	33%
No	25%	24%	32%
Unsure	29%	25%	27%

Bases: Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender-Expansive n=1,345

LGBTQ-friendly Perceptions of Country, State and Community: Most LGBTQ participants considered their local community to be LGBTQ-friendly, which may be an indication that LGBTQ people move to places where they feel more welcome. The state-by-state analysis was most fascinating, as people living in "blue" states had high praise for their state and local community, and those living in deep "red" states had negative perceptions of their state, but more positive perceptions of their local community.

Do you agree or disagree with these statements?		All USA	California	Texas	New York	Florida	MS + AL + KS + OK + NE + AR
I live in an LGBT-friendly city, town, or community.	Agree	82%	92%	78%	92%	86%	53%
	Disagree	18%	8%	22%	8%	14%	47%
I live in an LGBT-friendly state or province.	Agree	66%	99%	19%	98%	56%	9%
	Disagree	34%	1%	81%	2%	44%	91%
I live in an LGBT-friendly country.	Agree	56%	56%	59%	59%	62%	57%
	Disagree	44%	44%	41%	41%	38%	43%

Agree includes strongly agree and somewhat agree. Disagree includes strongly disagree and somewhat disagree. No neutral option was given.

Bases: USA n=17,420; Canada n=2,131; CA n=2,971; TX n=1,238; NY n=1,175; FL n=1,376; MS+AL+KS+OK+NE+AR n=415

Employment: LGBTQ participants have a wide variety of employment situations. In 2017, we wanted to look at some LGBTQ-specific implications of LGBTQ employment. The following slides examine LGBTQ purchasing power within workplaces and among LGBTQ business owners.

Which of the following best describes your current employment situation? (Please mark all that apply)	
Employed full-time	57%
Employed part-time (one or more jobs)	11%
Self-employed or business owner	11%
Unemployed	5%
Student	8%
Retired	11%
Disabled	6%
Other / none of above **1%**	
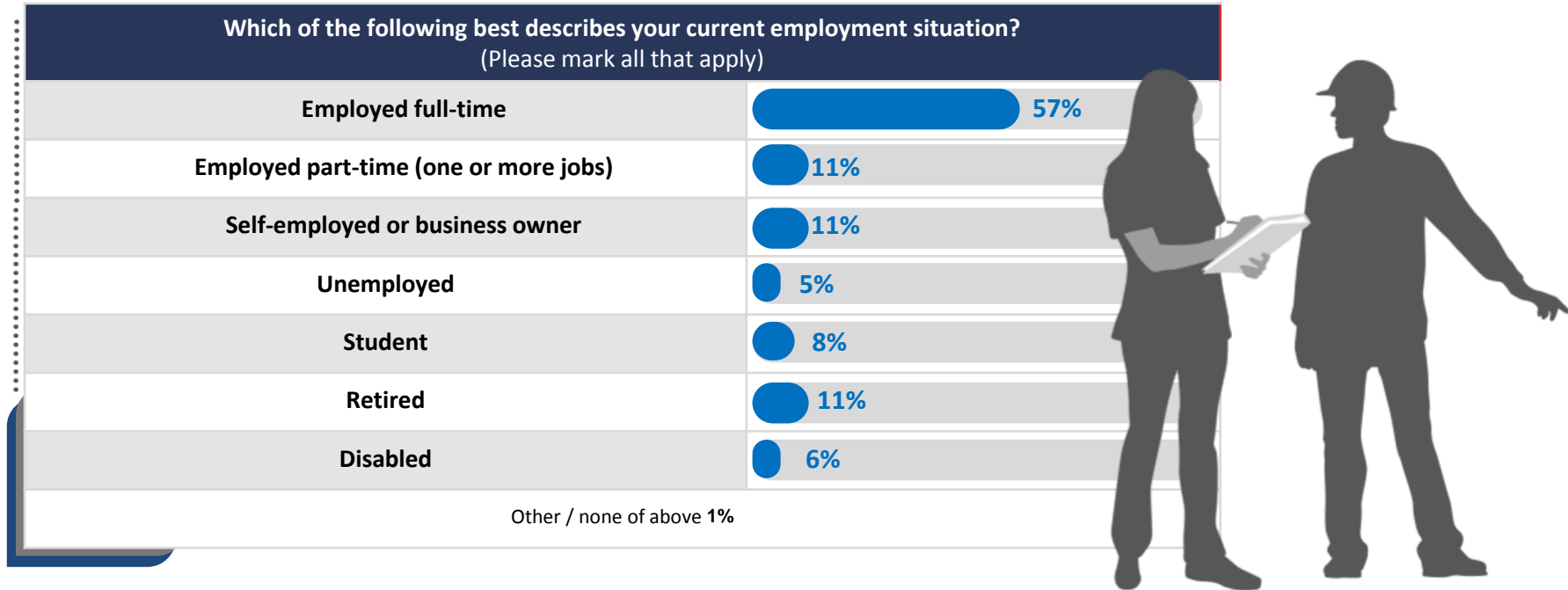
Power of LGBTQ Business Spending: Many studies have focused on the power of LGBTQ consumer spending. This question looks at LGBTQ spending from a different perspective: Community members who control budgets for their employers. As indicated in charts below, being an LGBTQ-friendly company influences purchasing power beyond individual consumer spending, and may significantly impact business spending.

AMONG THOSE EMPLOYED OR BUSINESS OWNERS

You indicated that you are employed full-time, part-time, or self-employed. Are you in a position that controls budgets or purchasing decisions for your company?	
Yes	31%
No	67%
Not sure	1%

AMONG BUDGET CONTROLLERS

How often does a company's LGBTQ-friendly reputation play a role in choosing one company over another when making purchases on behalf of your employer?	
All or nearly all the time	**8%**
Often	**19%**
Sometimes	**32%**
Rarely	20%
Never	22%

58%

AMONG BUDGET CONTROLLERS

In the past 12 months, how much did you purchase or procure on behalf of your employer?	
<$1000	14%
$1,000 - $9,999	24%
$10,000 - $49,999	20%
$50,000 - $99,999	11%
$100,000 - $499,000	16%
$500,000 - $999,9999	6%
$1 Million+	10%

Bases: USA n=17,420; USA (Employed Full-time, Part-time, or by Self) n=12,744; USA (Employed & Controls Budgets) n=4,232

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International Travel to the USA: With study participation from around the world, the survey gauged the implications of recent political changes on international travel to the United States. These two questions, fielded only to non-USA residents, yielded mixed results. On one hand, the intention to travel to the United States was still reasonably high. However, among those not intending to visit, most cited political reasons for not visiting, vs. practicalities such as money or lack of time.

How likely are you to travel to the United States in the next 12 months?

	Very Likely	Somewhat Likely	Somewhat Unlikely	Very Unlikely
Canada	29%	15%	14%	42%
UK	16%	13%	19%	51%
Australia	16%	13%	13%	59%
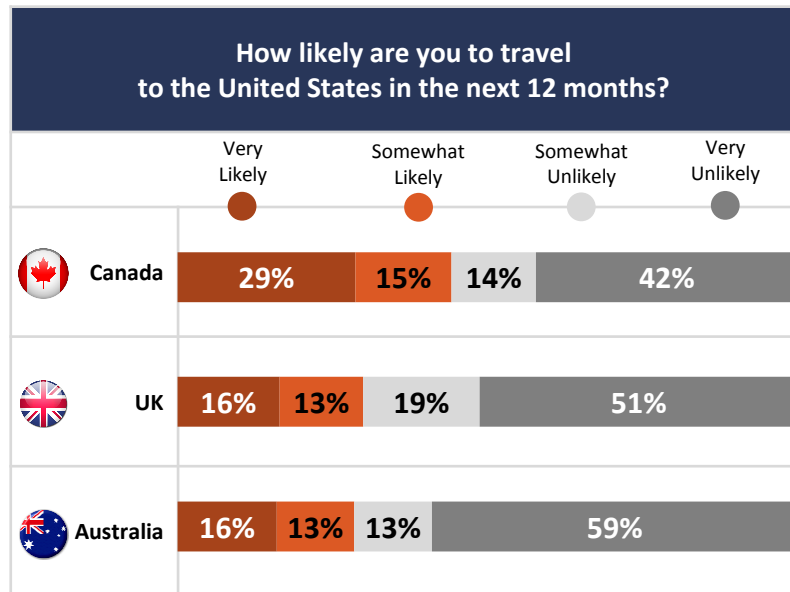
Why are you **unlikely** to travel the United States in the next 12 months? (Please mark all that apply)	Country		
	Canada	UK	Australia
The policies of the new U.S. administration / President	79%	63%	65%
I don't feel welcome as an LGBTQ person	46%	35%	27%
Safety and security concern	38%	23%	28%
Heard negative news about the United States	33%	23%	19%
I don't feel welcome as a foreigner	28%	24%	23%
Prefer other destinations	25%	30%	36%
Not enough money	22%	44%	38%
High crime rate	18%	13%	15%
Not likely to travel outside my region	9%	11%	9%
Not enough time	9%	19%	18%
Difficulty to obtain a U.S. visa	2%	10%	6%
Flight to the United States is too long	1%	9%	7%
Other reasons	14%	11%	14%

Bases: Canada n=2,131; UK n=565; Australia n=288;
Bases (Unlikely to Travel to the US in 12 Months): Canada n=1,190; UK n=393; Australia n=206

LGBTQ Community and Anticipated Changes:
Most LGBTQ community members feel that ten years from now there will be increases in the number of people who identify as transgender or non-binary, straight allies, and bisexual. At the same time, the community feels more neutral as to whether there will be greater numbers of LGBTQ newspapers, LGBTQ-specific bars, or LGBTQ community members living in traditional LGBTQ neighborhoods. These results were similar to the 2016 findings.

Do you think the following will have increased or decreased, 10 years from now?	Will Increase	Will Stay About the Same	Will Decrease
People who identify as transgender, genderqueer or non-binary	86%	13%	2%
Non-LGBTQ "straight allies"	77%	20%	3%
LGBTQ retirement communities	73%	24%	3%
People who identify as bisexual	71%	27%	3%
LGBTQ dedicated websites	61%	34%	5%
LGBTQ political non-profits	52%	42%	6%
LGBTQ community centers	42%	46%	12%
Local LGBTQ sports teams / leagues	36%	58%	7%
Proportion of LGBTQs living in "LGBTQ neighborhoods"	34%	42%	25%
Bars and nightclubs specific for the LGBTQ community	22%	45%	33%
Local LGBTQ newspapers	19%	49%	32%

Bases: USA n= 17,420

FOR MORE INFORMATION:

CMI's highly specialized services are based on 25 years of dedicated experience, producing LGBTQ (lesbian, gay, bisexual, transgender, queer) market intelligence for leading corporate clients and organizations across the country and around the world.

Serving a variety of industries, we leverage our in-house proprietary panel of more than 90,000 community-representative LGBTQ consumers to produce consumer survey studies, recruit and facilitate focus groups, interviews, etc. Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBTQ research/sales/marketing/best practices corporate training and conference presentations.

Contact CMI to learn more about custom research, analysis and reporting on the variety of topics explored in our LGBTQ consumer studies, including:

- o Financial Outlook
- o Purchasing Behavior
- o Media Consumption
- o Living Environment
- o Terminology
- o LGBTQ Social / Peer Circles
- o Brand 'LGBTQ friendliness'
- o Social Concerns
- o Technology
- o Segments Within LGBT

- o Travel Behavior
- o Motivations
- o Sports and Recreation
- o Social Media Habits
- o Product Categories
- o **Custom Surveys, Focus Groups, In-Depth Interviews and other research methodologies**

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Let us help you better understand your opportunities, grow your LGBTQ market share, and improve return on investment.

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

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

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)

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

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	HAWAI'I TOURISM AUTHORITY	VISITFLORIDA	LAS Vegas CONVENTION AND VISITORS AUTHORITY
Penn UNIVERSITY of PENNSYLVANIA	JOHNS HOPKINS UNIVERSITY	CUNY 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	U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT	FDA
nielsen	qualtrics	Ipsos	GfK	ICF INTERNATIONAL	C+R RESEARCH

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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.