



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



13th Annual LGBTQ Community Survey[®]

USA Summary Report
July 2019



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ABOUT CMI: 25+ YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has been conducting LGBTQ consumer research for over 25 years.

Our practice includes online surveys, in-depth interviews, on-site focus groups, virtual focus groups and LGBTQ recruitment assistance to university and government LGBTQ research projects. CMI maintains our own panel of 90,000 LGBTQ research participants. Our work is worldwide, with an emphasis on the United States, Canada, Mexico, China and Japan. 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.

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, Absolut Vodka, Aetna Insurance, Google, New York Life, UPS, DIRECTV, Target Brands, T. Rowe Price, Johnson & Johnson, WNBA, AT&T, Hallmark, Greater Fort Lauderdale Convention & Visitors Bureau, Las Vegas Convention & Visitors Authority, NYC & Company, Argentina Tourism Office, Visit Britain, Hawai'i Tourism Authority, U.S. Census Bureau, U.S. 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 13th ANNUAL LGBTQ COMMUNITY SURVEY METHODOLOGY & ASSUMPTIONS

INVITATION TO PARTICIPATE

About 200 global study partners participated in recruiting LGBTQ community members to complete the survey. Partners include LGBTQ media, events and organizations. A full list is presented on slides 6 and 7. Partners used a combination of print ads, digital ads, apps, membership email broadcasts, influencers, blogs, and social media for recruitment.

GLOBAL SURVEY RESPONDENTS

Over **32,000** respondents across **130 countries and regions** participated in the 2019 survey, which was fielded in English, Spanish, French, and Hungarian.

USA RESPONDENTS OVERALL



This report focuses on the **U.S. data** for **6,909** self-identified gay and bisexual men, **3,321** lesbian and bisexual women, and **1,409** transgender and non-binary community members. This is a total of **11,639** USA participants aged 18 to 77.



HIGHLIGHTS FROM CMI's 12th COMMUNITY SURVEY

This report contains an additional section featuring highlights from our 12th annual report. (Some of our questions are asked every other year, so selected results from 2018 are provided.)



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to take the largest survey of its kind!

LGBTQsurvey.com

CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992.
Community Marketing & Insights is Proudly LGBTQ-Operated. Founded in 1992.
Your survey information is confidential and secure, used for research only.
You will not be contacted for marketing purposes. Learn more: www.CMI.info

ABOUT CMI'S 13th ANNUAL LGBTQ COMMUNITY SURVEY

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 across 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

USA survey respondents are recruited through CMI's proprietary LGBTQ research panel (26% of all participants), and through our partnerships with about 200 global LGBTQ media, events and organizations (74% of participants). Because CMI has little control over partner sample or response, we do not profess that the 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, organizations 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 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 (transgender and non-binary participants). Generations reported include Millennial Plus (born 1981-2001), 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 13th ANNUAL LGBTQ COMMUNITY SURVEY

METHODOLOGY & ASSUMPTIONS

USA Report

Completes n=11,639 participants

All 50 states represented

- 26% from CMI panel
- 74% from 201 participating LGBTQ media and organization partners

Global Participation in Research

n=32,514 participants

From 130 countries

Results Weighted by Identity

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

Results Weighted by Generation

Millennial + (1981-2001)	33%
Generation X (1965-1980)	33%
Baby Boomer + (1942-1964)	33%



Results are 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.



THE SURVEY WAS FIELDDED IN ENGLISH, SPANISH, FRENCH AND HUNGARIAN



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

CMI's 13th ANNUAL LGBTQ COMMUNITY SURVEY • RESEARCH PARTNERS (1/2)

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

!! Omg Blog !!
 A&U Magazine
 Academia Society, Inc., The
 Adelante Magazine
 Advocate/advocate.com
 Albuquerque LGBTQ Chamber of Commerce
 ASANA
 AspenOUT (Roaring Fork Gay and Lesbian Community Fund)
 Atlanta Gay and Lesbian Chamber of Commerce (AGLCC)
 Atlanta Pride Committee
 Austin LGBT Chamber of Commerce
 Autostraddle
 Baltimore OUTloud
 Barb Elgin, LCSW-C
 Bay Area Reporter
 Bay Windows
 Between The Lines/Pride Source Media Group
 Bisexual Resource Center
 BleuLife Media & Entertainment
 Blue Ridge Pride Center Inc
 boiMAGazine (boi Magazine, Inc)
 Boston Pride
 Boy Culture
 Camara de Comerciantes LGBT de Colombia
 Camp Magazine
 CDG Community
 Center for Black Equity
 CenterLink: The Community of LGBT Centers
 CGLCC
 ChicagoPride.com / GoPride Media

Circle of Voices Inc.
 cityXtra Magazine
 Colorado LGBTQ Chamber of Commerce
 Come Out With Pride Orlando
 Compass LGBT Community Center
 Compete Magazine/Media Out Loud
 Curve Magazine
 dailyxtra.com
 Dallas Voice | OUT North Texas
 Damron
 DC Center for the LGBT Community, The
 DDG Media Group
 DecorHomme
 Delta Foundation of Pittsburgh
 Desert Business Association
 Dopes on the Road
 Equally Wed
 Erie Gay News
 Experience Columbus
 Family Equality Council
 Fenuxe Magazine
 First Friday Breakfast Club
 Focus Mid-South Magazine
 Fredericton Pride
 Fugues
 GALA North Texas
 Gay City News
 Gay Desert Guide/K-Gay 106.5
 Gay Games Hong Kong 2022
 Gay Pop Buzz
 Gay San Diego

Gayborhood
 GayCalgary
 GayCities
 Gayly, The
 Gayvan.com
 GED Magazine
 Georgia Voice
 G-List, The
 GoGUIDE Magazine
 Golden Gate Business Association
 Goliath Atlanta Magazine
 GPSGAY
 GRAB Magazine
 Greater Fort Lauderdale LGBT Chamber - GFLGLCC
 Grindr
 GSBA / Travel Out Seattle
 GSHRadio
 Guide Arc en ciel Quebec Rainbow Guide
 Harlem Pride
 Harlem2020
 He Said Magazine
 Hep
 Hotspots Media Group
 Humen Media Group
 ImageOut - The Rochester LGBTQ Film Festival
 In the Life Atlanta
 Infolettre de Fugues
 Inside Out LGBT Film Festival
 InterPride
 Kalamos Care

In partnership with



Special Thanks to Our Translation Partners!



CMI's 13th ANNUAL LGBTQ COMMUNITY SURVEY • RESEARCH PARTNERS (2/2)

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

Las Vegas PRIDE
 Lesbian News
 Lesbian.com
 LGBT Chamber of Commerce of Illinois
 LGBT Community Center of Colorado (The Center)
 LGBT Community Center of the Desert, The
 LGBT+ Center Orlando, Inc.
 LGBTQ Welcome Center
 LGBTQWeddings.com
 Los Angeles Blade
 Love Inc. Magazine
 Maryland LGBT Chamber of Commerce
 MEGA Personalities
 METRA MAGAZINE
 Metro Weekly
 Miami-Dade Gay & Lesbian Chamber of Commerce
 Mid-America GLCC
 misterb&b
 Moovz
 Muskoka Pride
 My Gay Houston
 NAGLREP
 Nashville LGBT Chamber of Commerce
 National Queer Asian Pacific Islander Alliance (NQAPIA)
 NJ LGBT Chamber
 OBX Pride, Inc.
 ONE Community
 One Iowa
 OUT FRONT Magazine
 Out Professionals
 Out/out.com
 OutClique, LLC
 OutSmart Magazine
 outtraveler.com

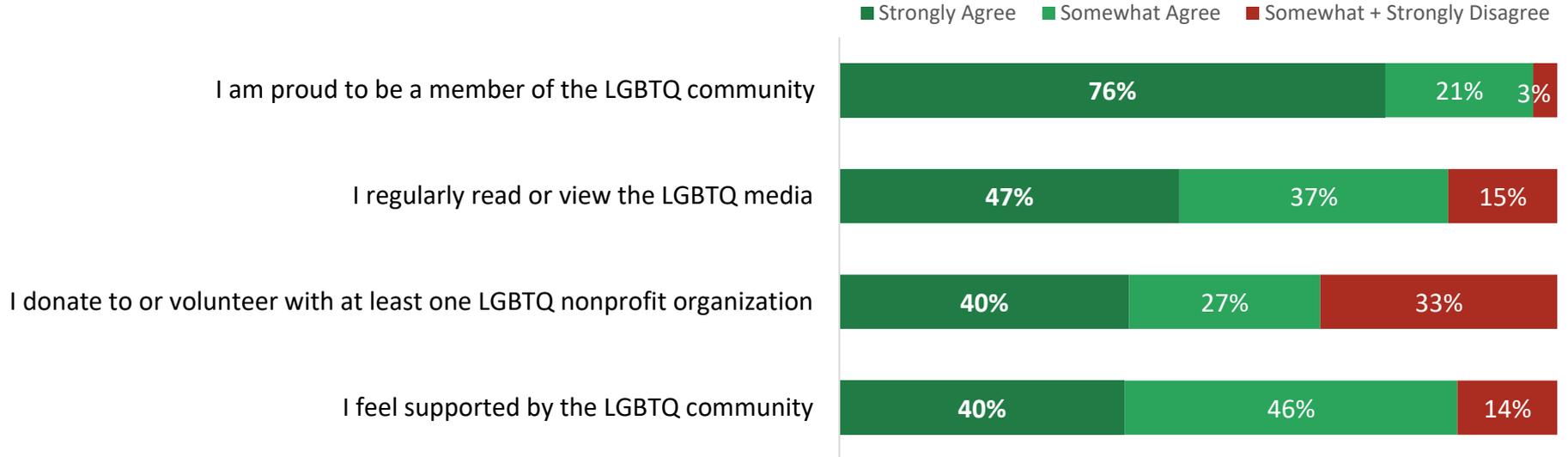
Outword
 Outword California
 PeachATL Magazine
 Peacock Panache
 Pink Banana Media
 Pink Spots/Rhineaux Media Corp.
 Plexus LGBT & Allied Chamber of Commerce
 Plus/hivplumag.com
 Polk Pride FL
 Pop Luck Club
 POZ
 Pride Journeys
 Pride Winnipeg Festival Inc.
 pride.com
 PrideGuide®USA
 Pridelines
 Pridezillas LLC
 Prizm
 Project MORE Foundation
 Project Q Atlanta | Q Magazine
 Project OUT
 Proud FM
 Q Magazine Key West
 Q Media Virginia
 Q Voice News
 QNotes / goqnotes.com
 QSaltLake Magazine
 Rage Monthly Magazine
 Rainbow 411
 Rainbow Chamber Silicon Valley
 Rainbow Times, The
 Raynbow Affair Magazine
 Reaching Out MBA, Inc
 Sacramento LGBT Community Center / Sacramento Pride

San Antonio LGBT Chamber of Commerce
 San Diego Pride
 San Francisco Bay Times / "Betty's List"
 Savannah Pride
 SAVE
 Seattle Lesbian, The
 Smart + Strong
 Soule
 South Florida Gay News
 Southeast Alaska LGBTQ Alliance
 Springs Equality
 Squirt
 Standard Magazine, The
 STRAIGHT
 SunServe
 SWERV Magazine
 Tagg Magazine
 therepubliq
 TomOnTour
 Trans-Masc Industries Inc.
 Triangle Community Center Inc.
 Tri-Versity Center
 UCHAPS
 Unity Coalition | Coalicion unida
 VIP Media Group
 Virginia Pride
 Washington Blade
 Watermark Publishing Group
 Whistler Pride and Ski Festival | GayWhistler
 Windy City Times
 Wire Magazine
 Wisconsin LGBT Chamber of Commerce
 Worcester Pride

Understanding the Research Participants and Their Connection with the LGBTQ Community

**We want to explore your personal connection with the LGBTQ community.
Do you agree or disagree with these statements?**

Among All LGBTQ





1

LGBTQ Demographics

Relationship Status: The survey last explored this question in 2017, and over the past two years we see little change in the percentages for relationship status. Overall, legally married increased just 2% over the period, and we are starting to see some same-sex divorces. Clearly, same-sex marriages have slowed since the rush to wed after the 2015 Supreme Court decision, and is now in a more stable growth cycle. As in past research, lesbian and bisexual women are far more likely to be in a relationship than gay and bisexual men. This has important consumer purchasing implications, as the decision-making process for purchases, and even types of products purchased, may be very different between single people and those in relationships.

Which of the following best describes your current relationship status? Please mark any that apply.

	Gay & Bisexual Men	Lesbian & Bisexual Women	Transgender and Non-Binary Participants
Single / not in a relationship	39%	29%	39%
In a relationship but not living with a partner (dating)	9%	11%	11%
In a relationship and living with a partner (no legal status)	17%	16%	14%
Legally married	28%	37%	29%
Civil union, registered domestic partner or common law	2%	3%	1%
Engaged	2%	3%	2%
Widow / Widower	2%	2%	3%
Divorced from a same-sex spouse	1%	3%	--
Divorced from an opposite-sex spouse	2%	4%	--
Polyamorous relationship	2%	3%	9%
Other	1%	1%	3%

Defining Relationships in the Non-Binary: Not all relationships are defined as binary (same-sex or opposite-sex couple). Many LGBTQ community members are in a relationship where at least one partner identifies as other than male or female. Marketers and employers should be careful to use language that is inclusive and respectful.

**You indicated that you are in a relationship. How would you describe your relationship?
Please mark any that apply.**

Among Those In a Relationship

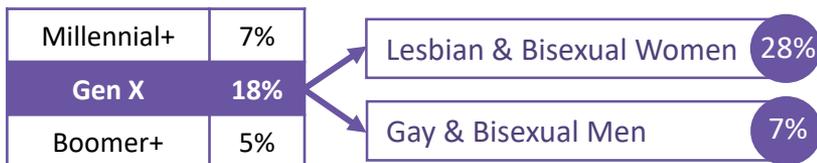
	Gay & Bisexual Men	Lesbian & Bisexual Women	Transgender and Non-Binary Participants
Female same-sex couple (female-female couple)	--	85%	16%
Male same-sex couple (male-male couple)	94%	--	17%
Opposite-sex couple (female-male couple)	5%	11%	23%
Non-binary / Transgender couple (where one or both partners identifies as transgender or outside the gender binary)	<1%	6%	54%
Queer couple (any gender)	1%	10%	32%
Polyamorous relationship	2%	4%	14%
Other	<1%	1%	3%

LGBTQ Parents: There are more LGBTQ parents than many might think. In this study, 32% of gender-expansive community members, 31% of lesbian and bisexual women and 14% of gay and bisexual men have a child of any age. However, the percentages are much lower for those with children under age 18, which tends to be most important for consumer marketing. LGBTQ parents of a child under age 18 tend to be more concentrated in late Millennial and Generation X lesbian, bisexual women and gender-expansive community members. The research also shows a surprisingly high percentage for LGBTQ Baby Boomers with grandchildren. It should be noted that these parent rates may be lower than other studies as this research may have smaller percentages of bisexual participants. These LGBTQ parent percentages are similar to when we last reported this question in 2017.

Do you have children or grandchildren? Please mark all that apply.

	All LGBTQ	Gay & Bisexual Men	Lesbian & Bisexual Women	Transgender and Non-Binary Participants
YES to Have Children (TOTAL)	24%	14%	31%	32%
I have children under age 18 living in my home.	8%	3%	13%	9%
I have children under age 18 not living in my home.	2%	2%	2%	4%
I have children over age 18.	14%	9%	17%	22%
Prefer not to answer	1%	<1%	1%	2%

Have Children Under Age 18 Among

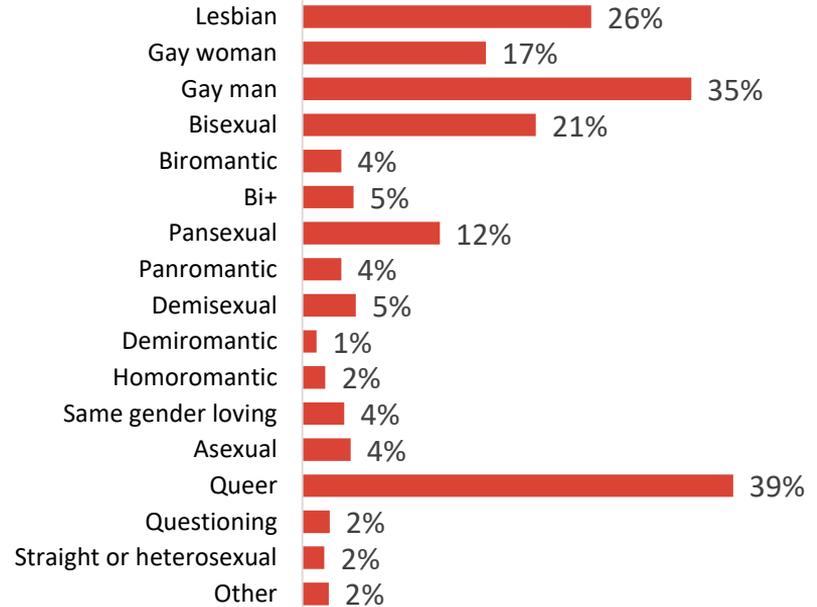
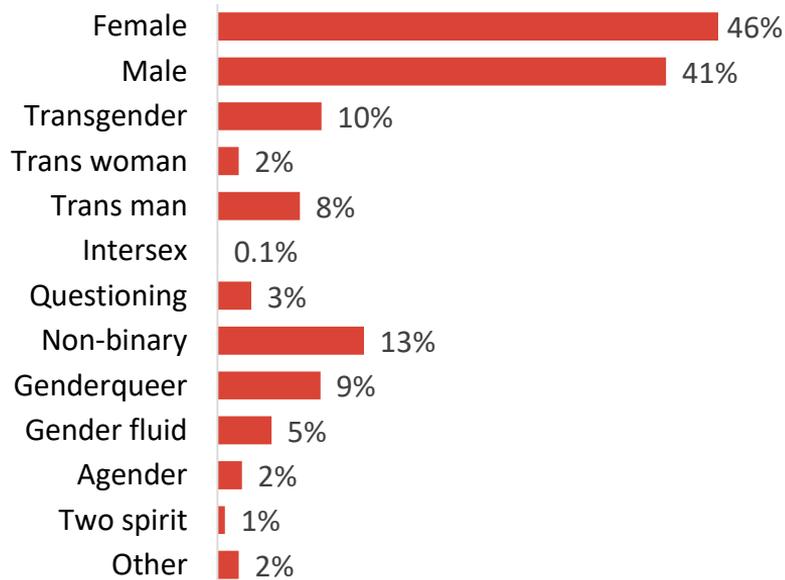


17%
Baby Boomer+
Have Grandchildren

Base: All LGBTQ n=11,639; Gay & Bi Men n=6,909; Lesbian & Bi Women n=3,321; Gender-Expansive n=1,409
Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641

Identities Among Millennial+: When asked questions around sexual orientation and gender identity, the LGBTQ Millennials are more diverse in their identity selections than older generations.

How do you describe yourself? Please mark all that apply.
Among Millennial+



Base: Unweighted Millennial+ n=3,598

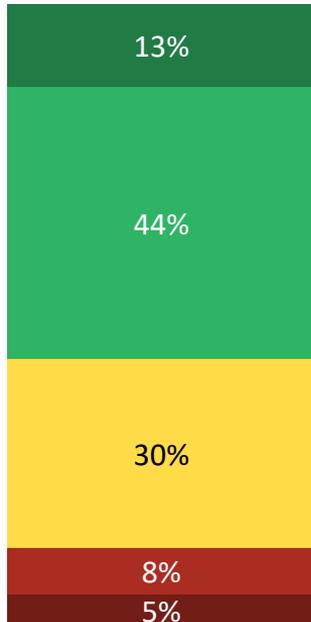


2

LGBTQ Finances

Financial Status Self Evaluation: As an ongoing question in the annual LGBTQ community survey, 57% of participants indicated a positive current economic situation, 30% neutral and 13% negative. This 2019 positive result is 3% higher than in 2018 and 6% higher than in 2017. However, a positive economic outlook is not consistent across demographics within the LGBTQ community.

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



5 – Very Positive, I'm doing great financially

4 – Positive, I am doing better than most

3 – Neutral, I'm doing alright financially but just breaking even

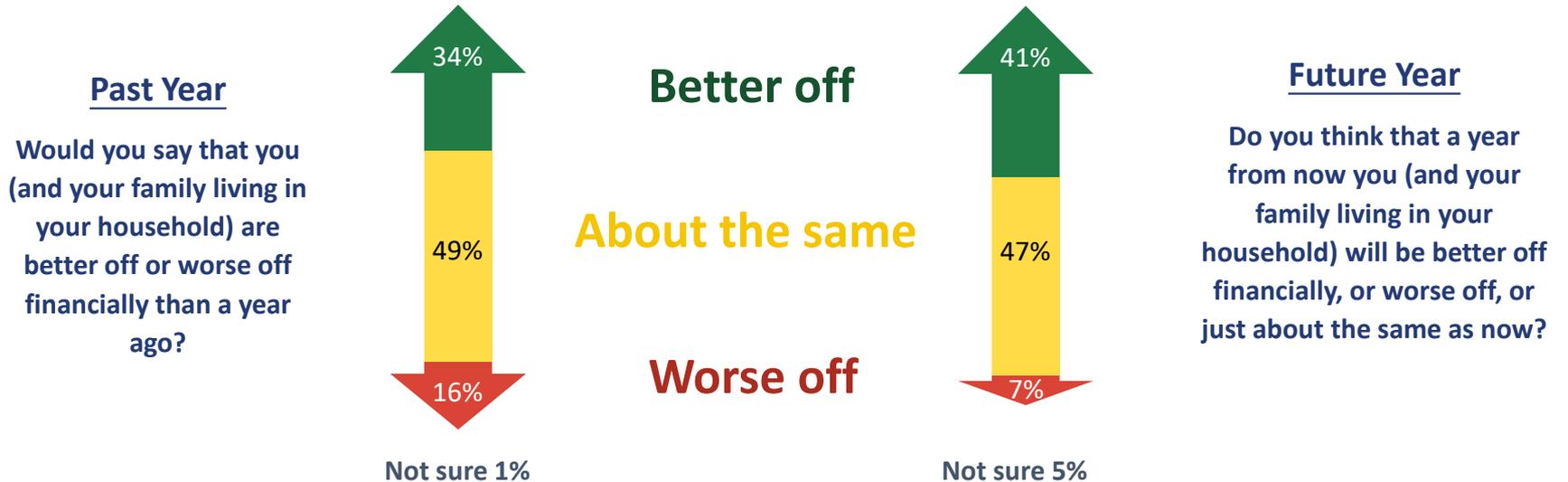
2 – Negative, I'm falling behind financially

1 – Very Negative, I am struggling to make financial ends meet

Total Positive (5+4) by Demographic	
Gay and Bisexual Men	59%
Lesbian and Bisexual Women	58%
Transgender and Non-Binary Participants	43%
Millennial+	52%
Generation X	58%
Baby Boomers+	61%
Asian	58%
Black	46%
Latino	54%
White	59%

Base: All LGBTQ n=11,639

Financial Confidence: Using a similar question, again we find that the LGBTQ community is neutral to positive about their past year and expected future year economic situation.





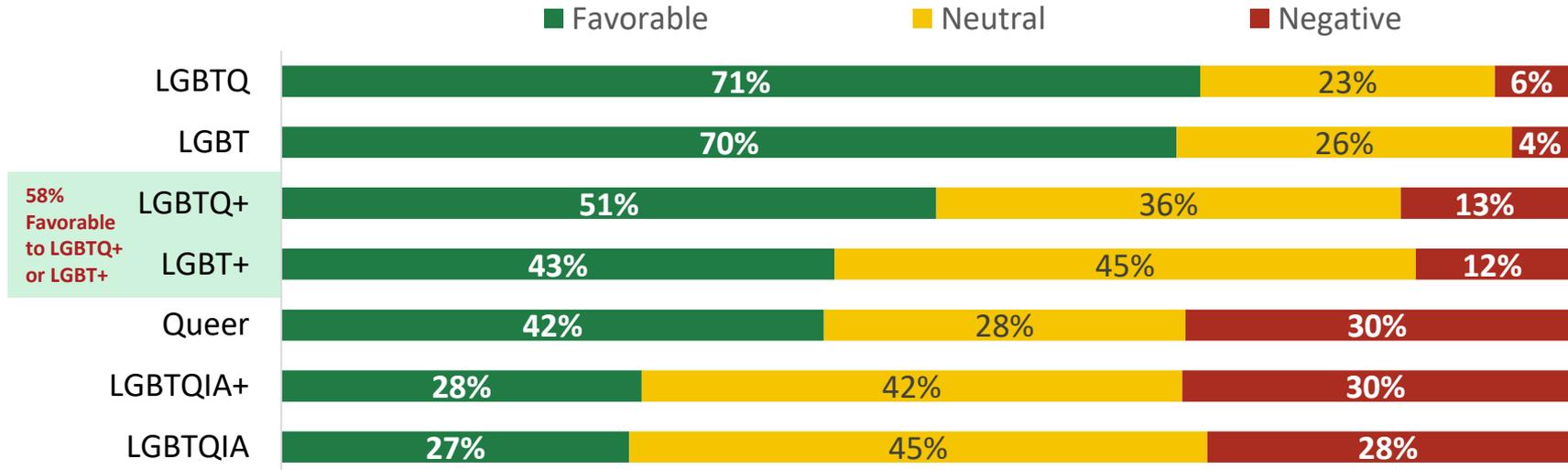
3

Terminology within the Community

Terminology within the LGBTQ Community: In our annual poll about community terminology, we find that LGBTQ and LGBT are tied as the preferred term to describe our community. However, the more important change over time is the comparative lack of a negative response to nearly all the terms. In earlier years, some reacted more negatively to the letter Q and the term Queer. Also, the addition of the “+” symbol is gaining acceptance over time, especially among younger community members (see next slide).

The following terms are often used to describe our community. Please rate how you feel about each, when you see them used by corporations, non-profits or in the media.

My opinion of the use of the terms... For all LGBTQ Participants



Terminology by Demographic: Detail of More Popular Terms

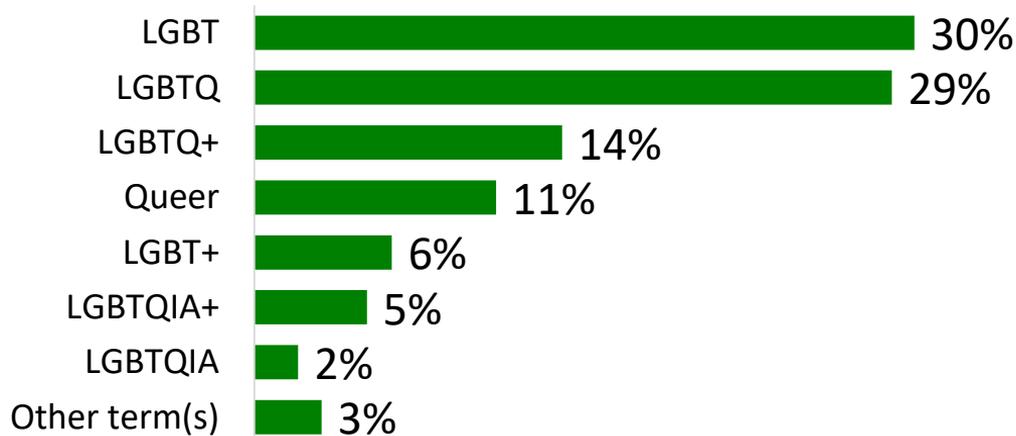
The following terms are often used to describe our community. Please rate how you feel about each, when you see them used by corporations, non-profits or in the media. My opinion of the use of the terms...

		All LGBTQ	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive	Millennial+	Generation X	Baby Boomer+
LGBTQ	Favorable	71%	67%	76%	71%	73%	70%	70%
	Neutral	23%	26%	20%	25%	23%	24%	22%
	Negative	5%	7%	4%	4%	4%	5%	7%
LGBT	Favorable	70%	77%	66%	55%	62%	71%	77%
	Neutral	26%	21%	29%	35%	32%	26%	20%
	Negative	4%	2%	5%	10%	6%	3%	3%
LGBTQ+	Favorable	51%	42%	58%	61%	65%	47%	39%
	Neutral	36%	40%	33%	31%	27%	39%	44%
	Negative	13%	18%	9%	8%	8%	14%	17%
LGBT+	Favorable	43%	41%	45%	46%	49%	40%	39%
	Neutral	45%	45%	45%	43%	40%	47%	47%
	Negative	12%	14%	10%	11%	11%	13%	13%
Queer	Favorable	42%	30%	51%	56%	55%	38%	32%
	Neutral	28%	30%	27%	25%	25%	30%	30%
	Negative	30%	40%	22%	19%	20%	31%	39%

Terminology within the LGBTQ Community: New in 2019, for those who selected at least one favorable response, we asked a forced choice of only one term. The most important implications for this result is that there is no consensus on the preferred term to describe the community at this time. In addition, 70% indicated that they prefer something more than just LGBT. CMI feels this is a recognition that the community is more than just the “original alphabet.” Also, this and other slides in this section suggest that those who react favorably to the addition of the +, prefer LGBTQ+ over LGBT+.

**Of the previous terms, which is your *preferred* term to describe our community?
Please mark only one.**

Among those selected at least one term as “favorable” in the previous question



- ✓ Only 30% favorable just using LGBT
- ✓ 61% favorable using a term that includes Q or the word Queer.
- ✓ 25% favorable using a term that includes +

Terminology by Demographic Detail

Of the above terms, which is your preferred term to describe our community?
Please mark only one.

Among those selected at least one term as “favorable” in the last question

	All LGBTQ	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive	Millennial+	Gen X	Boomer+
LGBT	30%	40%	23%	17%	20%	32%	38%
LGBTQ	29%	30%	29%	23%	21%	30%	35%
LGBTQ+	14%	11%	17%	16%	21%	12%	9%
Queer	11%	6%	14%	21%	20%	9%	4%
LGBT+	6%	7%	6%	6%	8%	6%	5%
LGBTQIA+	5%	3%	6%	11%	7%	5%	3%
LGBTQIA	2%	1%	2%	2%	1%	2%	1%
Other term(s)	3%	3%	2%	4%	2%	3%	4%

Base: Selected at least one term as “favorable” in the last question - All LGBTQ n=10,706; Gay & Bi Men n=6,256; Lesbian & Bi Women n=3,125; Gender-Expansive n=1,325; Millennial+ n=3,398; Gen X n=3,070; Boomer+ n=4,238



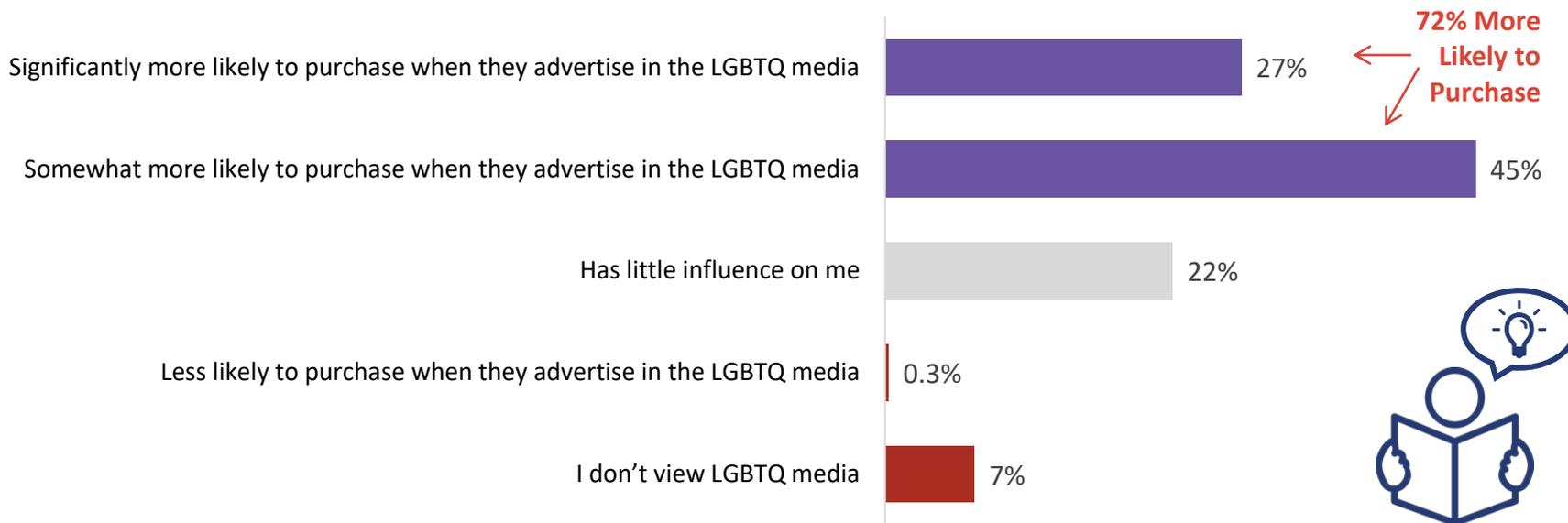
4

Media and Events

Importance of Advertising in the LGBTQ Media: Advertising in the LGBTQ media makes a purchasing difference to 72% of the LGBTQ community.

How are you influenced when companies advertise in the LGBTQ digital and print media?

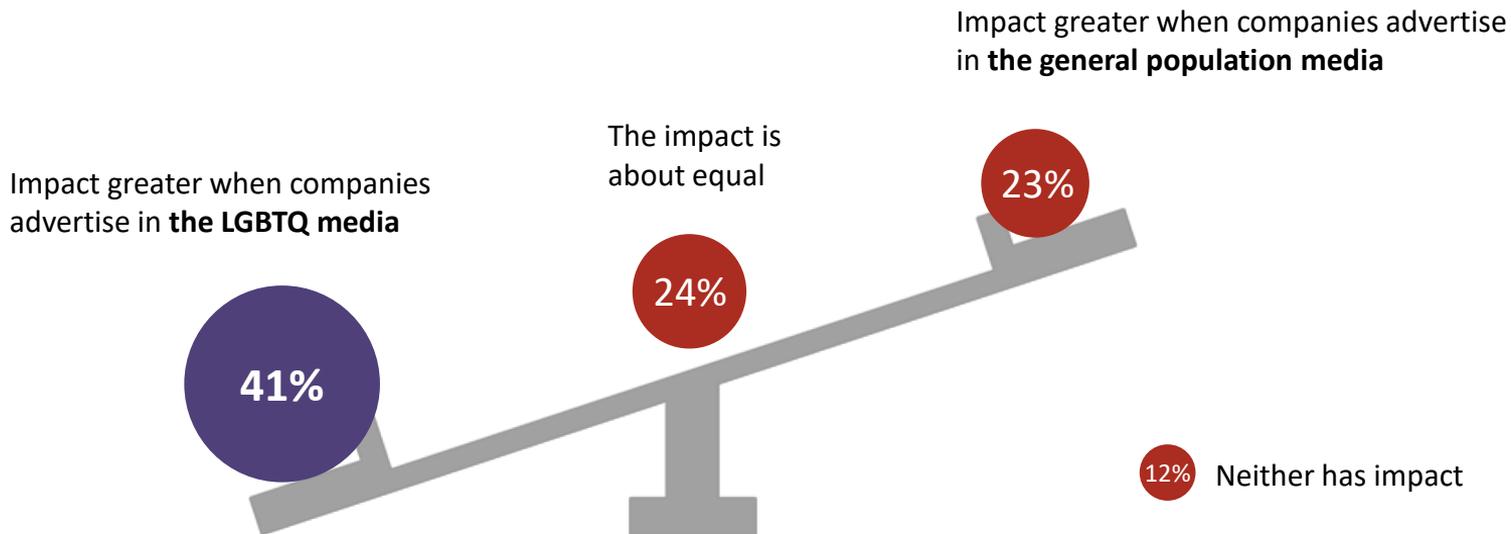
Among All LGBTQ



Impact of Advertising in the LGBTQ Media: Advertising in the LGBTQ media is more impactful to LGBTQ consumers than advertising in the general population media.

What has a greater impact on you? Please pick one.

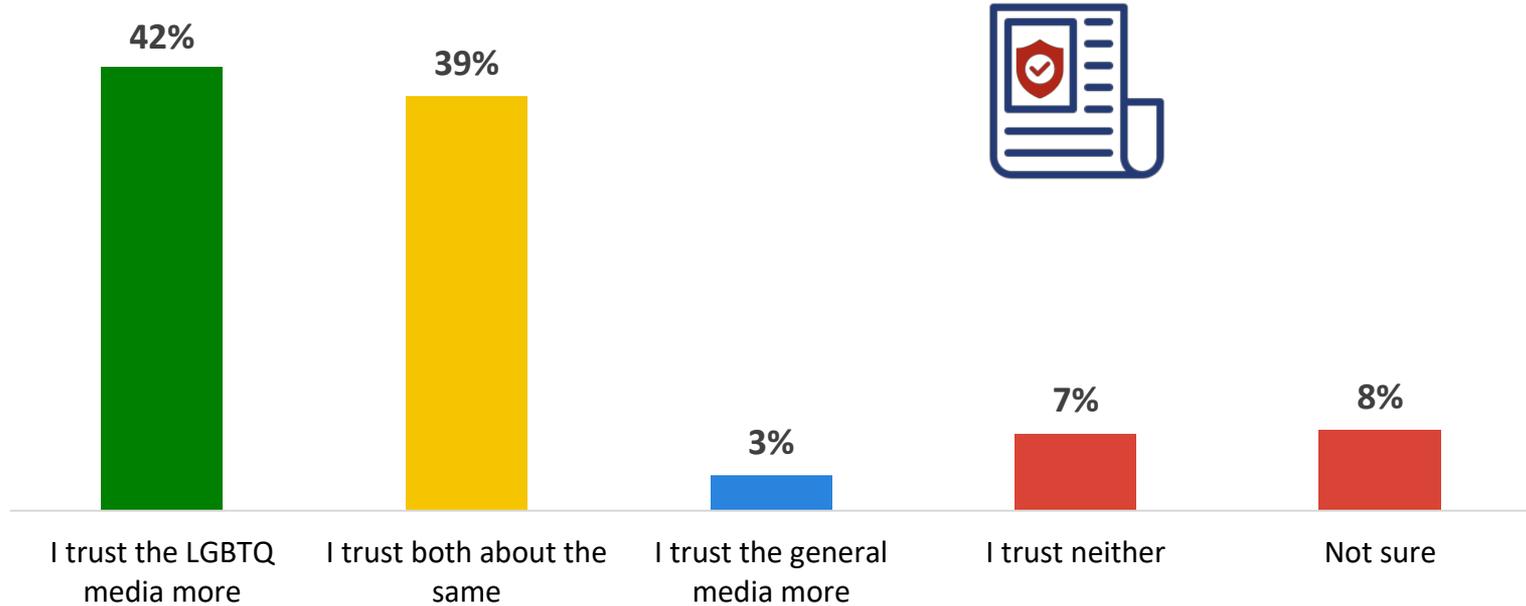
Among All LGBTQ



Trust in the LGBTQ Media: When reading LGBTQ news stories, the LGBTQ community trusts the LGBTQ media more than the reporting in the general media.

When reading LGBTQ news stories, which reporting do you trust more?

Among All LGBTQ



LGBTQ Media Interaction (Past 12 Months): The overall result of the chart below indicates that readership of LGBTQ print media is stable and LGBTQ digital viewership is increasing.

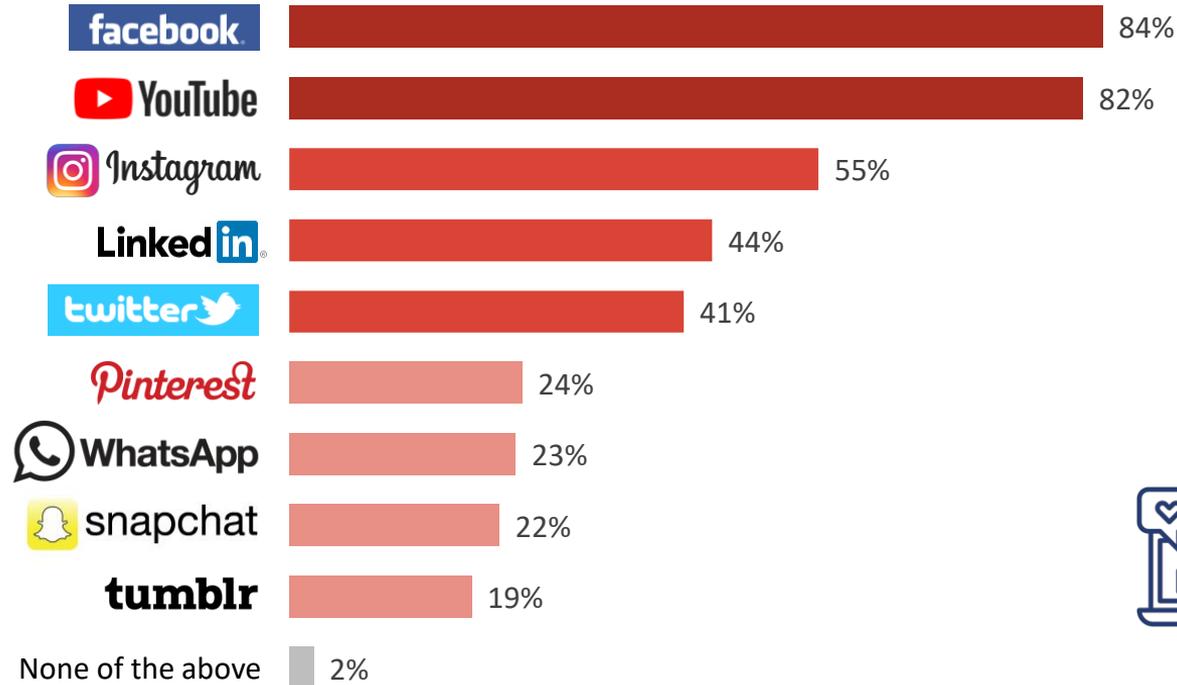
Has your interaction with LGBTQ media (newspapers, websites, etc.) changed over the past 12 months?

		ALL LGBTQ	Millennial+	Generation X	Baby Boomer+
Visiting LGBTQ news websites/apps	Increased	28%	33%	26%	23%
	Same	53%	49%	54%	56%
	Decreased	6%	5%	6%	6%
	Do not read	14%	12%	14%	15%
Visiting LGBTQ entertainment websites/apps	Increased	25%	33%	24%	18%
	Same	53%	50%	54%	56%
	Decreased	6%	6%	7%	7%
	Do not read	16%	12%	15%	20%
Reading LGBTQ regional newspapers	Increased	13%	17%	12%	11%
	Same	47%	38%	47%	55%
	Decreased	10%	6%	12%	11%
	Do not read	31%	40%	29%	23%
Reading LGBTQ national magazines	Increased	11%	15%	11%	9%
	Same	48%	40%	48%	56%
	Decreased	10%	6%	13%	12%
	Do not read	31%	39%	29%	24%

Base: Varies

Which of the following social platforms have you used in the past 30 days? Please mark all that apply.

Among All LGBTQ

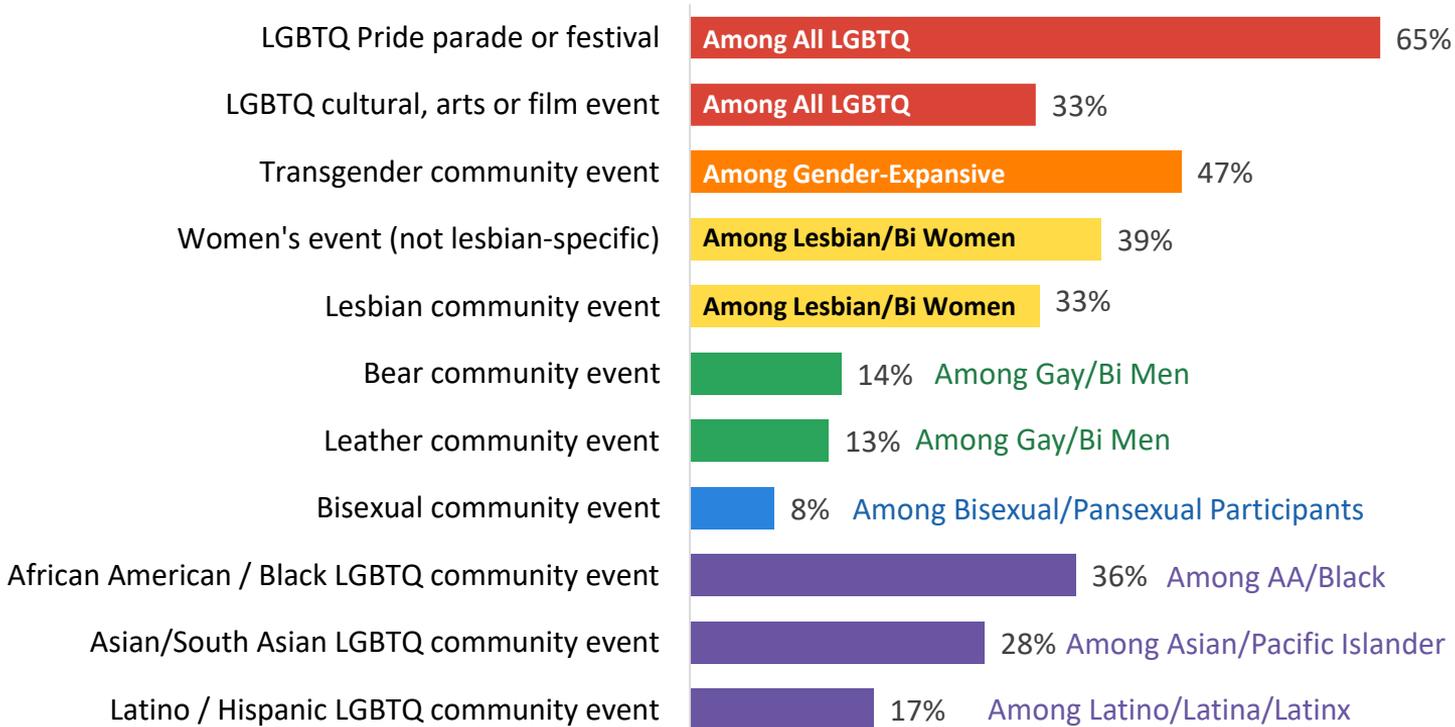


**Which of the following social platforms have you used in the past 30 days? Please mark all that apply.
By gender and generation:**

	All LGBTQ	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive	Millennial+	Generation X	Baby Boomer+
 facebook	84%	82%	86%	80%	84%	86%	82%
 YouTube	82%	83%	80%	84%	87%	83%	75%
 Instagram	55%	55%	56%	48%	77%	57%	30%
 LinkedIn	44%	47%	42%	34%	46%	49%	36%
 twitter	41%	42%	40%	41%	49%	44%	30%
 Pinterest	24%	18%	30%	26%	25%	26%	21%
 WhatsApp	23%	28%	20%	15%	28%	24%	17%
 snapchat	22%	23%	21%	18%	43%	17%	5%
 tumblr	19%	26%	11%	23%	28%	17%	12%
None of the above	2%	3%	2%	3%	1%	1%	5%

Base: All LGBTQ n=11,639; Gay & Bi Men n=6,909; Lesbian & Bi Women n=3,321; Gender-Expansive n=1,409; Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641

Which type(s) of LGBTQ events have you attended in the past 12 months? Please mark all that apply.



Which type(s) of LGBTQ events have you attended in the past 12 months? Please mark all that apply. By gender and generation:

	All LGBTQ	Gay & Bisexual Men	Lesbian & Bisexual Women	Transgender / Non-Binary Participants	Millennial+	Generation X	Baby Boomer+
LGBTQ Pride parade or festival	65%	66%	65%	61%	69%	66%	61%
LGBTQ cultural, arts or film event	33%	35%	31%	32%	31%	32%	35%
LGBTQ nonprofit gala or fundraiser	26%	30%	22%	23%	22%	26%	28%
LGBTQ professional association meeting or conference	20%	22%	19%	20%	22%	22%	18%
LGBTQ circuit party / dance event	14%	17%	12%	13%	22%	12%	8%
LGBTQ sports tournament or event	10%	11%	10%	6%	12%	11%	8%
LGBTQ families event	6%	5%	7%	10%	6%	8%	4%
LGBTQ event at a theme park	5%	7%	3%	4%	5%	5%	4%
Women's event (not lesbian-specific)	21%	4%	39%	19%	23%	20%	21%
Lesbian community event	18%	3%	33%	11%	15%	16%	22%
Transgender community event	13%	9%	11%	47%	13%	13%	12%

Base: All LGBTQ n=11,639; Gay & Bi Men n=6,909; Lesbian & Bi Women n=3,321; Gender-Expansive n=1,409; Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641



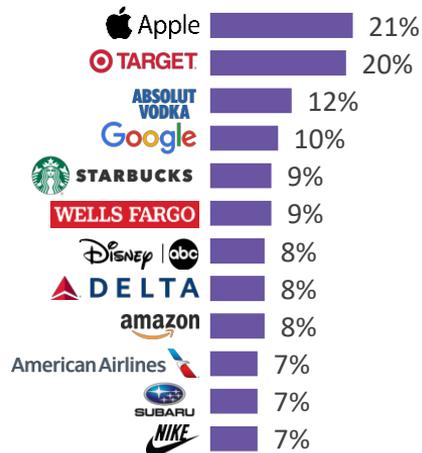
5

LGBTQ Consumer Purchasing

Brand Recall: Every year, CMI asks an unaided, “write-in” recall question about brands that show genuine, authentic support of the LGBTQ community through their outreach or pro-LGBTQ policies or practices? In 2019, we continue to see strong percentages for Apple, Target, Absolut, Google, Starbucks, Subaru and Wells Fargo, among others. Note the success of some smaller brands for the lesbian and bisexual women and gender-expansive community members.

In this survey, we also want to explore how businesses and brands support the LGBTQ community. Which companies or brands do you think go above and beyond to show genuine, authentic support of the LGBTQ community through their outreach or pro-LGBTQ policies or practices? You may write up to 5 companies or brands.

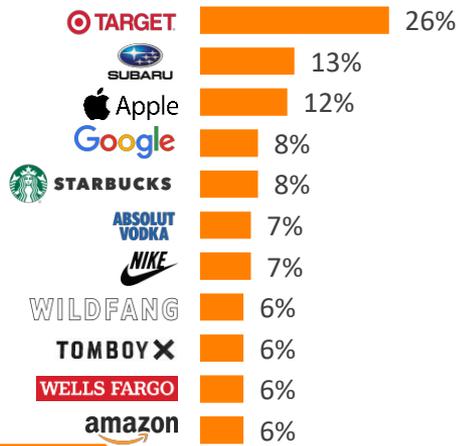
Gay & Bisexual Men



3%-5%

AT&T, Bank of America, Ben & Jerry's, Budweiser, Chase, Coca-Cola, GAP, Hilton, IKEA, Levi's, Macy's, Marriott, Microsoft, Miller Coors, Southwest Airlines, United Airlines

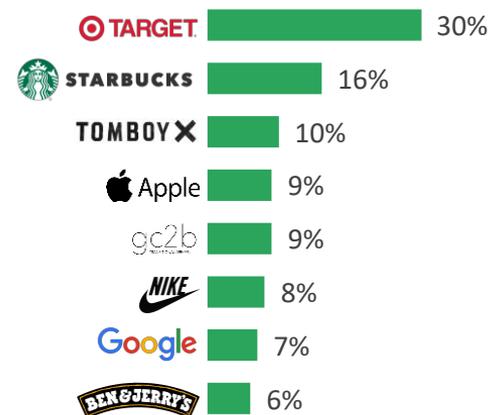
Lesbian & Bisexual Women



3%-5%

American Airlines, Ben & Jerry's, Budweiser, Campbell's, Coca-Cola, Delta Air Lines, Disney/ABC, GAP, IKEA, Levi's, Macy's

Transgender and Non-Binary Participants



3%-5%

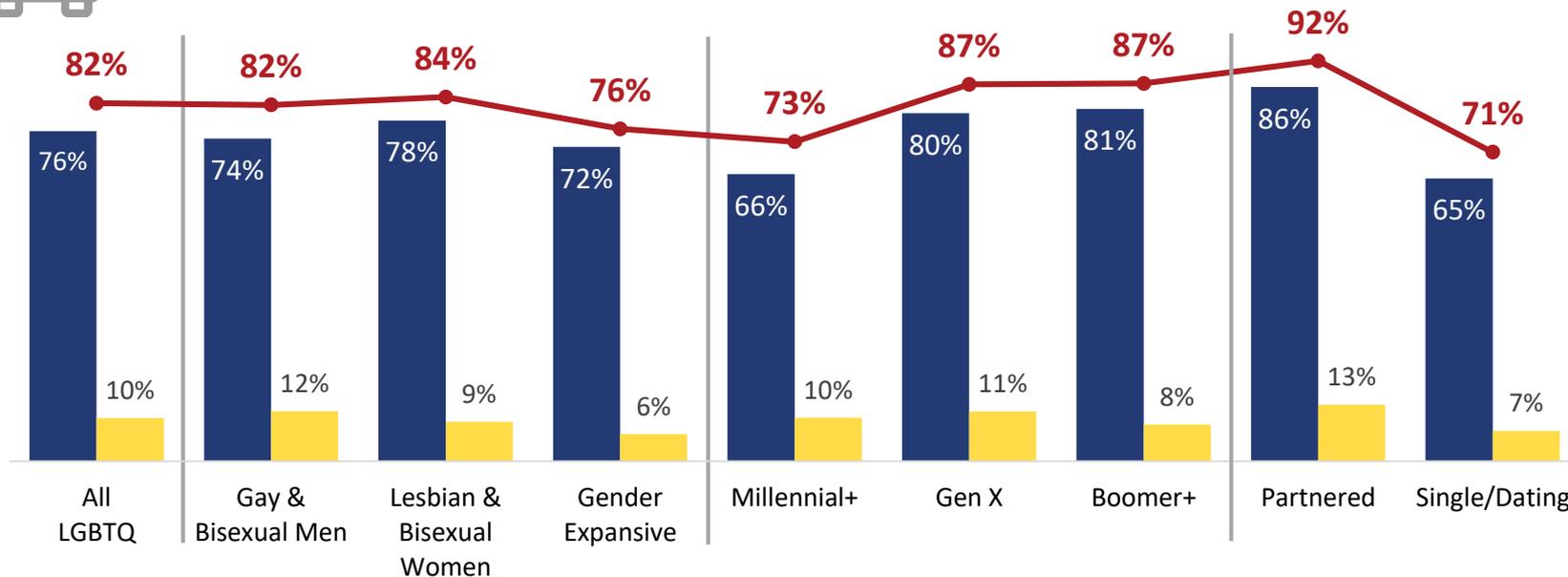
Absolut, Amazon, Levi's, Lush, Microsoft, Sephora, Subaru

Car ownership: Car ownership in the LGBTQ community tends to be slightly lower than the general population, most likely because a higher percentage of LGBTQs live in dense urban environments. However, overall the vast majority of LGBTQ community members own or lease cars.



Do you and/or your spouse/partner currently own or lease one or more automobiles?

■ Yes, own ■ Yes, lease ● Total own or lease

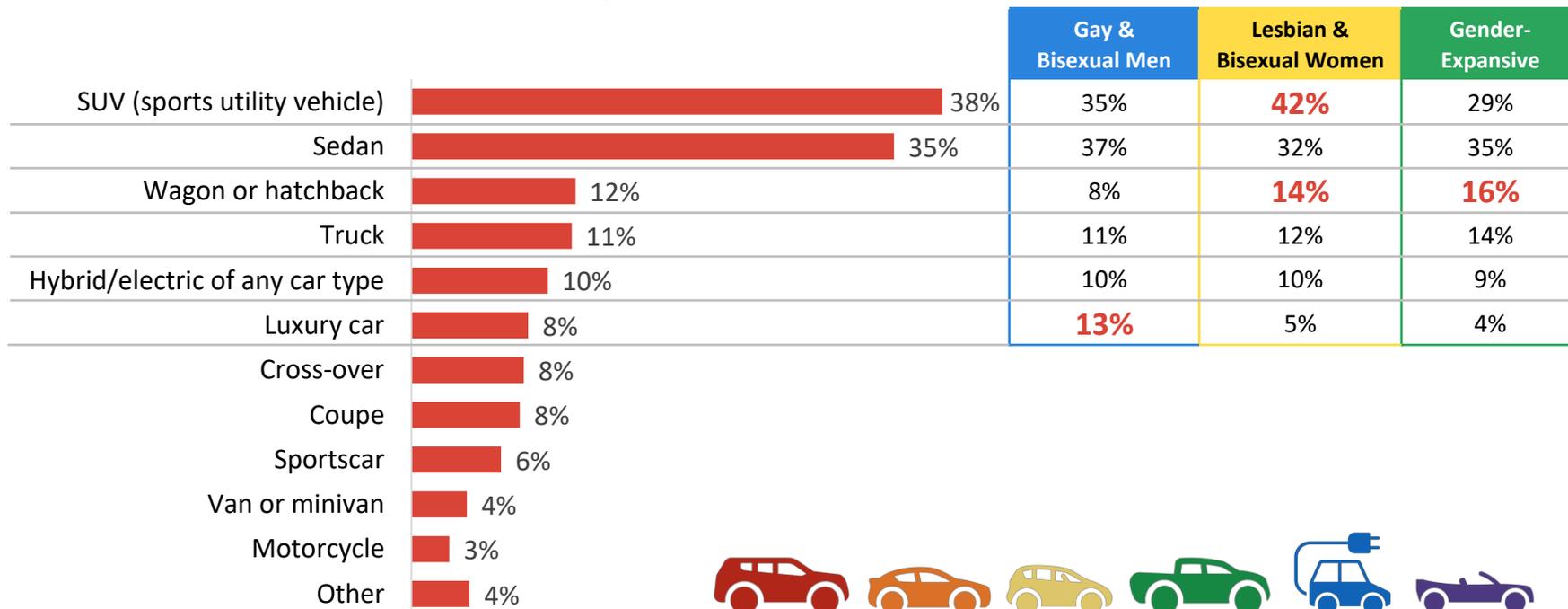


Base: All LGBTQ n=11,639; Gay & Bi Men n=6,909; Lesbian & Bi Women n=3,321; Gender-Expansive n=1,409; Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641; Partnered n=5,833; Single/Dating n=5,359

Type of Car: There are demographic differences by gender on the types of cars owned in the LGBTQ community.

What type of automobiles/vehicles do you currently own or lease?
 Check all that apply as multiple selections might exist for the same car.

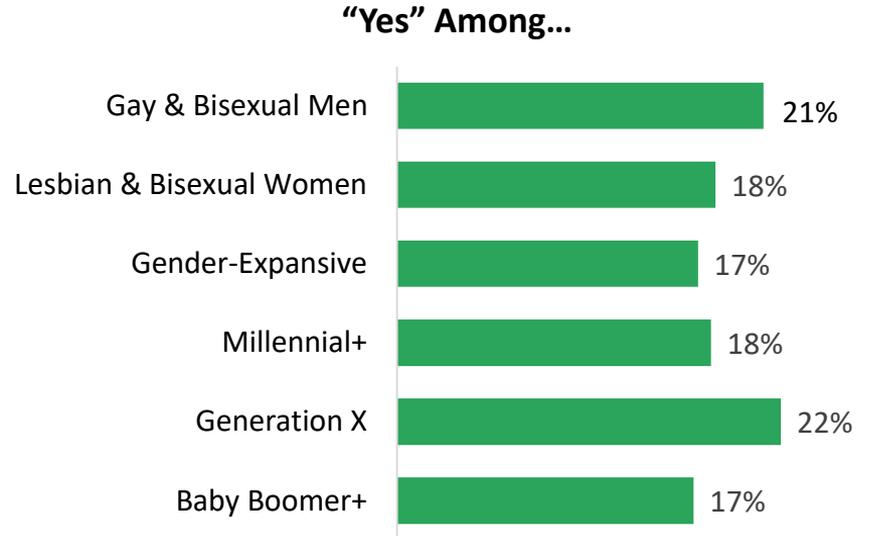
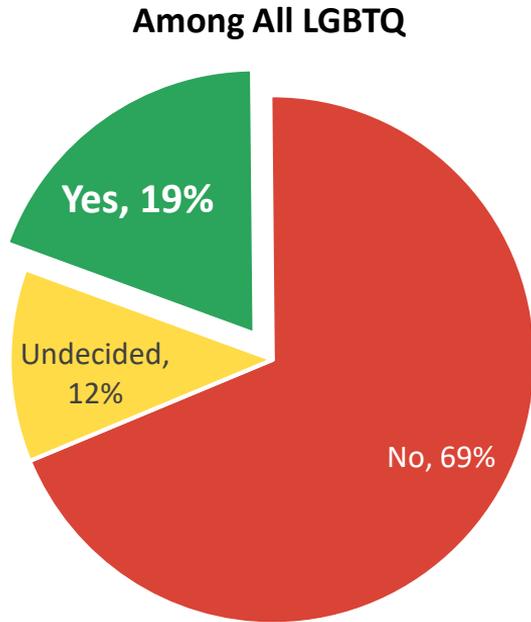
Among Those Who Own or Lease a Car



Base: Those who own or lease a car - All LGBTQ n=9,477;
 Gay & Bi Men n=5,761; Lesbian & Bi Women n=2,719; Gender-Expansive n=997

Future Car Purchases: 19% of the participants indicated that they are considering purchasing or leasing a new automobile or vehicle in the coming 12 months. There were no major differences by demographic.

Are you considering purchasing or leasing a new automobile or vehicle in the coming 12 months?



Base: All LGBTQ n=11,639; Gay & Bi Men n=6,909; Lesbian & Bi Women n=3,321; Gender-Expansive n=1,409; Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641

Banking / Financial Services

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

	All LGBTQ	Millennial+	Generation X	Baby Boomer+
Checking account	95%	95%	96%	95%
Credit card (any kind)	86%	84%	86%	89%
Retirement account of any kind*	66%	57%	71%	69%
Money market, savings, or CD account	53%	51%	53%	55%
Home mortgage	37%	21%	48%	42%
Student loans	29%	48%	31%	9%
Utilize tax advice or tax preparation services	29%	22%	31%	35%
Online brokerage account / stock purchase account	27%	21%	30%	30%
Financial planning services**	22%	11%	22%	32%
Home improvement or home equity loan	8%	2%	9%	12%
Business loans	2%	2%	3%	2%
None of the above	1%	1%	1%	1%
Prefer not to answer	2%	1%	2%	2%



*Retirement account of any kind (e.g., 401K, IRA, RRSP, TFSA)

**Financial planning services (by company or independent financial planner)

Base: All LGBTQ n=11,639; Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641

Household Purchases

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

	All LGBTQ	Millennial+	Generation X	Baby Boomer+
Smartphone	42%	42%	47%	38%
Article of clothing over \$100	41%	39%	45%	39%
Major piece of home furniture over \$500	28%	25%	33%	25%
Desktop or laptop computer for personal use	24%	22%	26%	23%
Electronic equipment or device over \$500	21%	19%	25%	20%
Major kitchen appliance over \$500	14%	8%	16%	18%
None of the above	24%	26%	21%	26%



Entertainment Purchase

Have you (or you and your partner) paid for any of the following entertainment during the past 12 months?
Please mark all that apply.

	All LGBTQ	Millennial+	Generation X	Baby Boomer+
Streaming television subscription (e.g. Netflix, Amazon Prime, Hulu)	77%	81%	82%	66%
A movie ticket at a theater	75%	79%	76%	69%
Cable internet	63%	54%	66%	68%
Live theatre or musical	52%	51%	52%	53%
Cable television (basic or with premium channels)	51%	30%	55%	69%
Live music concert	51%	55%	54%	43%
Subscription radio or paid music (e.g. SiriusXM, Pandora, Spotify, Apple Music)	48%	58%	49%	38%
None of the above	3%	3%	2%	3%



Skin Care Items Purchase

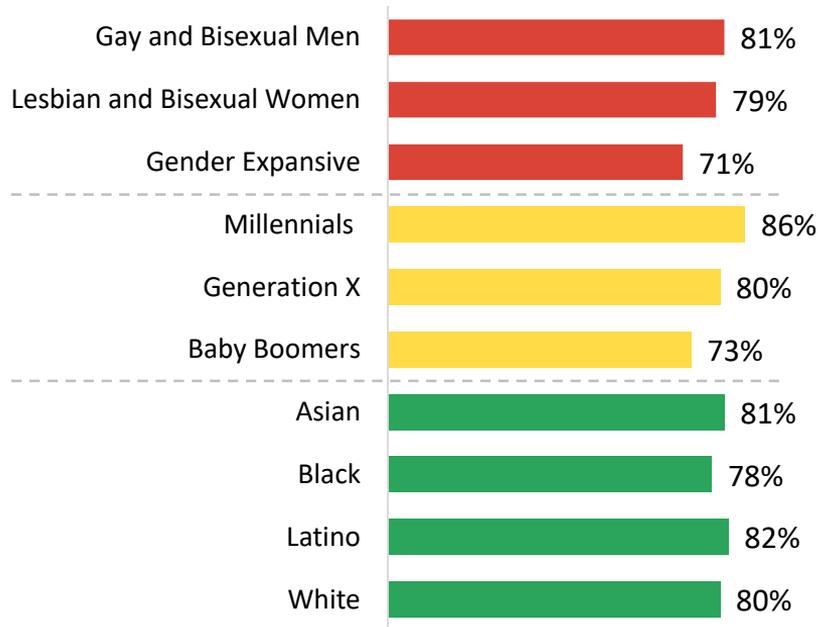
In the past six months, have you purchased any of these cosmetic, skin or beauty items for personal use?
Please mark all that apply.



	Gay & Bi Men			Lesbian & Bi Women			Gender-Expansive		
	Millennial +	Gen X	Boomer+	Millennial +	Gen X	Boomer+	Millennial +	Gen X	Boomer+
Facial moisturizer for day or night use	63%	55%	45%	72%	64%	56%	57%	53%	53%
Eye cream/ serum to reduce puffy eyes, dark circles, fine lines	30%	33%	21%	22%	31%	22%	13%	26%	28%
Teeth whitener (home or at dentist)	26%	27%	23%	15%	20%	16%	10%	15%	17%
Facial make-up, foundation, or concealer	15%	10%	5%	49%	43%	26%	31%	35%	44%
Hair color (home or at salon)	14%	19%	18%	27%	46%	35%	26%	32%	27%
Lipstick, gloss, pencil or products specifically for the lips	13%	10%	4%	46%	47%	29%	29%	41%	47%
Eyeliner or other eye makeup	9%	6%	3%	50%	45%	26%	30%	37%	45%
Nail polish (clear or colors)	8%	6%	3%	35%	32%	24%	25%	32%	36%
None of the above	27%	32%	41%	13%	16%	28%	21%	25%	27%
Base	1267	2252	3390	1487	861	973	844	287	278

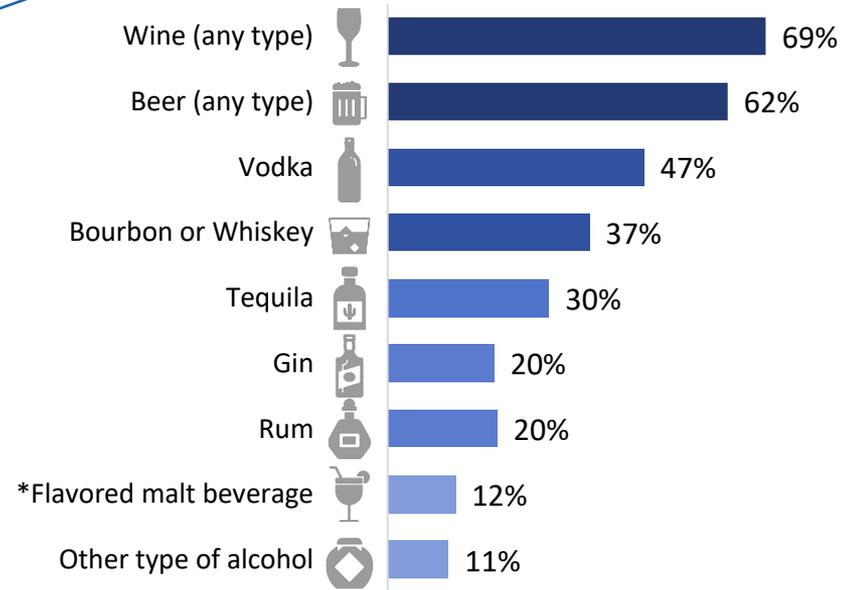
Alcohol Use: Alcohol beverage consumption is relatively consistent across all demographics in the LGBTQ community. Wine, beer and vodka remain the most popular alcohol beverages (see next slide).

In the past 90 days, have you consumed any type of beverage containing alcohol?



YES

In the past 90 days, what types of alcohol beverages have you purchased at a bar, restaurant or for home? Please mark all that apply.



Base: n=11,430 participants age 21 and over, n=9,023 purchased in past 90 days

* Full option: Flavored malt beverage (like a hard lemonade or hard seltzer)

Alcohol Consumption Types by LGBTQ Demographics

In the past 90 days, what types of alcohol beverages have you purchased at a bar, restaurant or for home?
Please mark all that apply.
By gender and generation:



	All LGBTQ	Gay & Bisexual Men	Lesbian & Bisexual Women	Gender-Expansive	Millennial+	Generation X	Baby Boomer+
Wine (any type)	69%	71%	69%	59%	72%	67%	69%
Beer (any type)	62%	62%	63%	63%	70%	61%	55%
Vodka	47%	57%	39%	34%	50%	50%	41%
Bourbon or Whiskey	37%	40%	33%	39%	44%	37%	29%
Tequila	30%	33%	28%	24%	37%	28%	23%
Gin	20%	23%	17%	16%	27%	17%	14%
Rum	20%	23%	17%	20%	25%	21%	14%
Flavored malt beverage*	12%	12%	13%	15%	18%	13%	6%

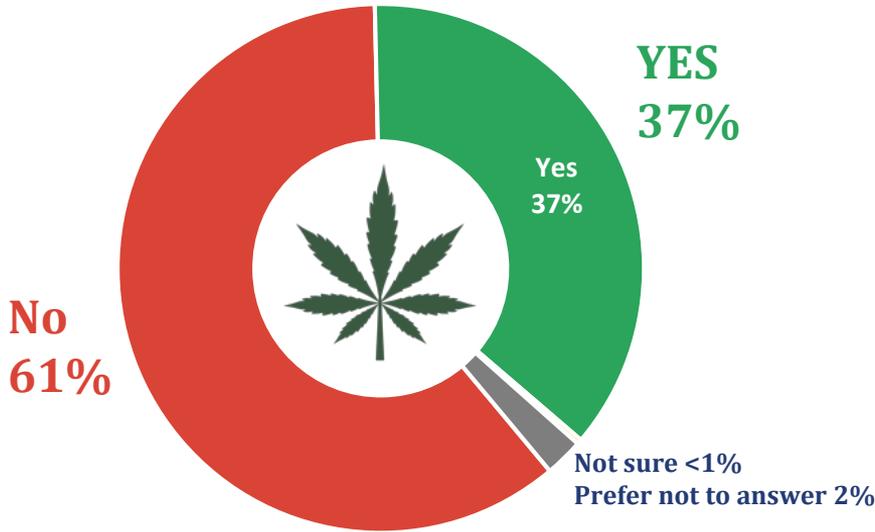
Base: Participants age 21 and over, n=9,023 purchased in past 90 days

* Full option: Flavored malt beverage (like a hard lemonade or hard seltzer)

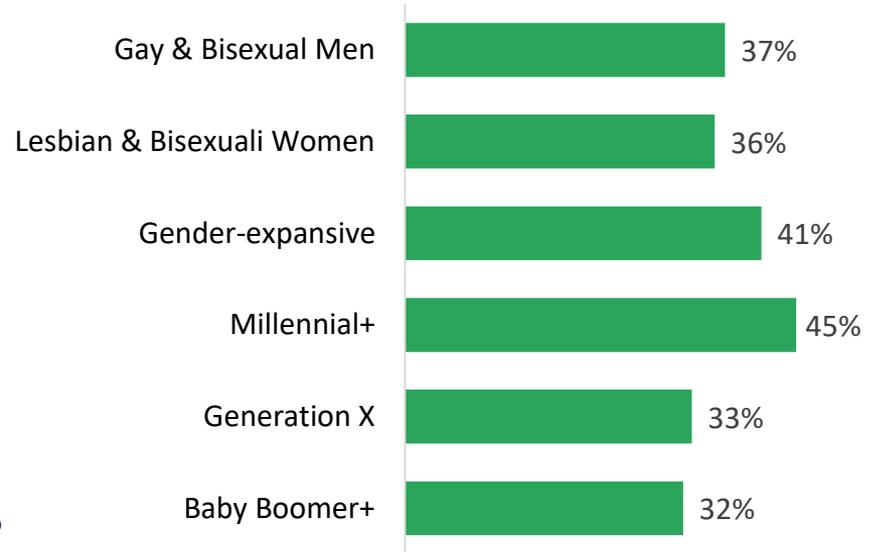
Use of Cannabis/Marijuana

In the past 12 months, have you used cannabis/marijuana in any form for recreational or medical reasons?

Among All LGBTQ



"Yes" Among...



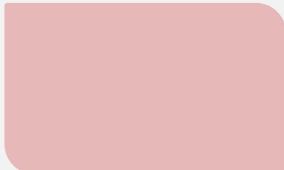
Base: All LGBTQ n=11,639; Gay & Bi Men n=6,909; Lesbian & Bi Women n=3,321; Gender-Expansive n=1,409; Millennial+ n=3,598; Gen X n=3,400; Boomer+ n=4,641



Highlights from CMI's 12th LGBTQ Community Survey[®]

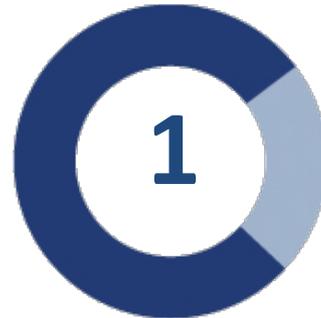
USA Report June 2018

This report contains an additional section featuring insights from our 12th annual report. With the great number of potential questions, we can not ask every question every year. Some of our questions are asked every other year, and highlights are provided here to help round out the report.



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

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



**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

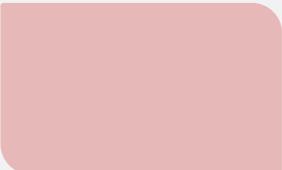
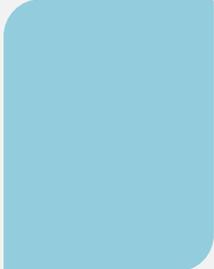


“Companies that support LGBTQ equality will get more of my business this year.”



76% Agree
22% Neutral
2% Disagree

Base: All LGBTQ n=18,531



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

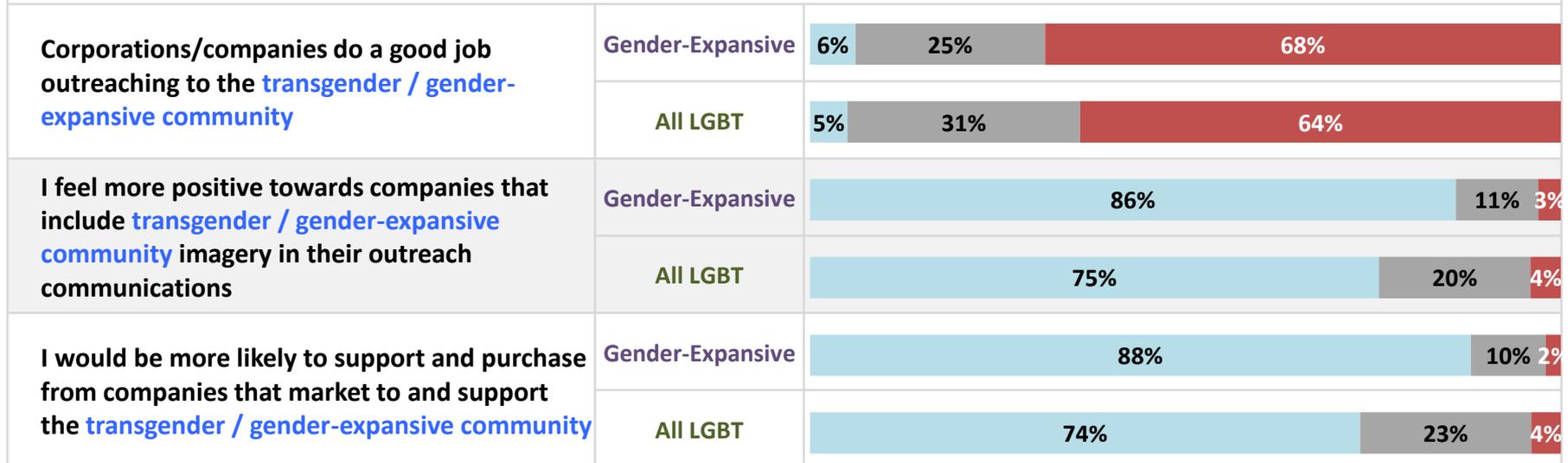


**How Corporations
 Fail in Their LGBTQ
 Outreach
 Approaches**

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



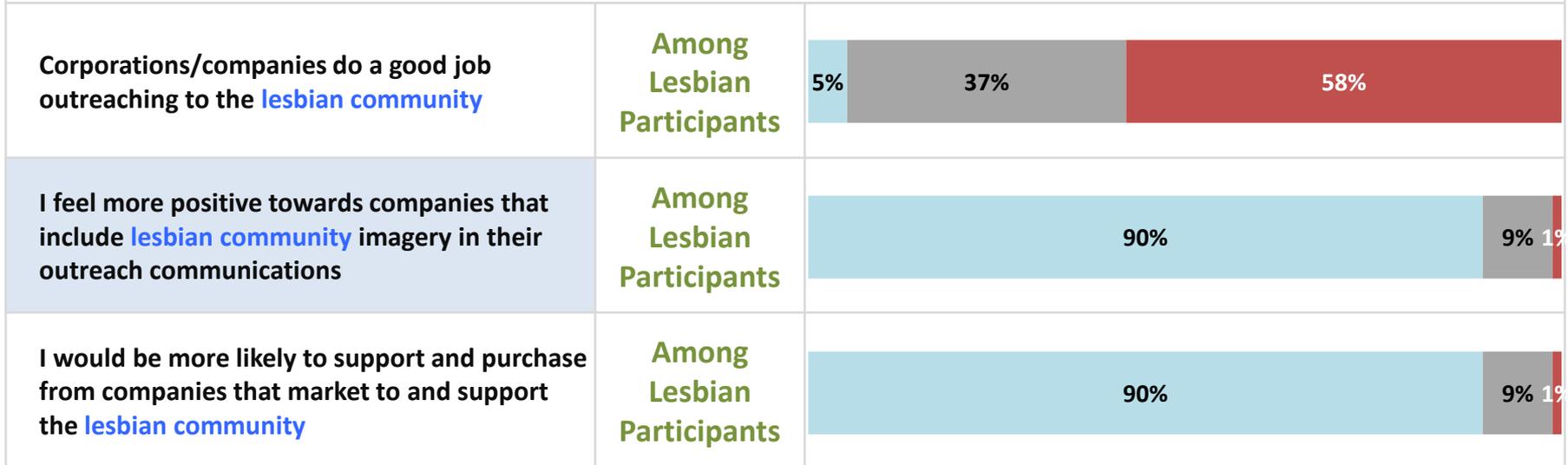
Base: Varies

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



Base: Varies

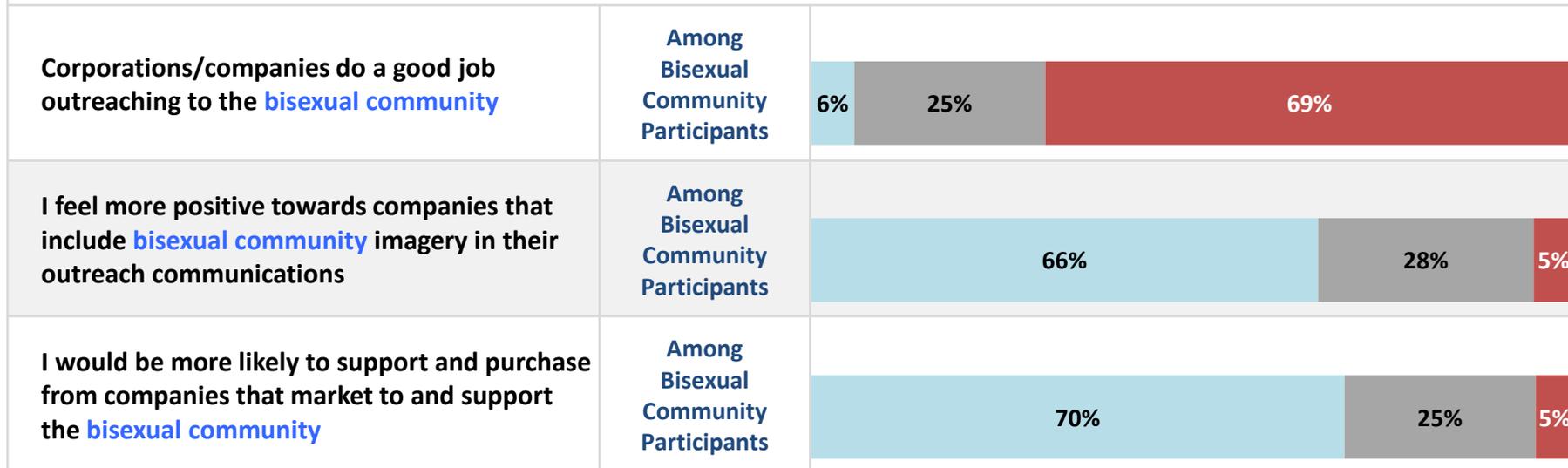
Outreach to the Bisexual Community: Similarly, bisexuals feel that corporations do a bad job outreaching to the bisexual community. In fact, from CMI's observations, we have rarely seen specific outreach to the B of LGBTQ.

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

● Agree

● Neutral

● Disagree



Base: Varies

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*



Base: Varies

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%

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*



Base: Varies

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%

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

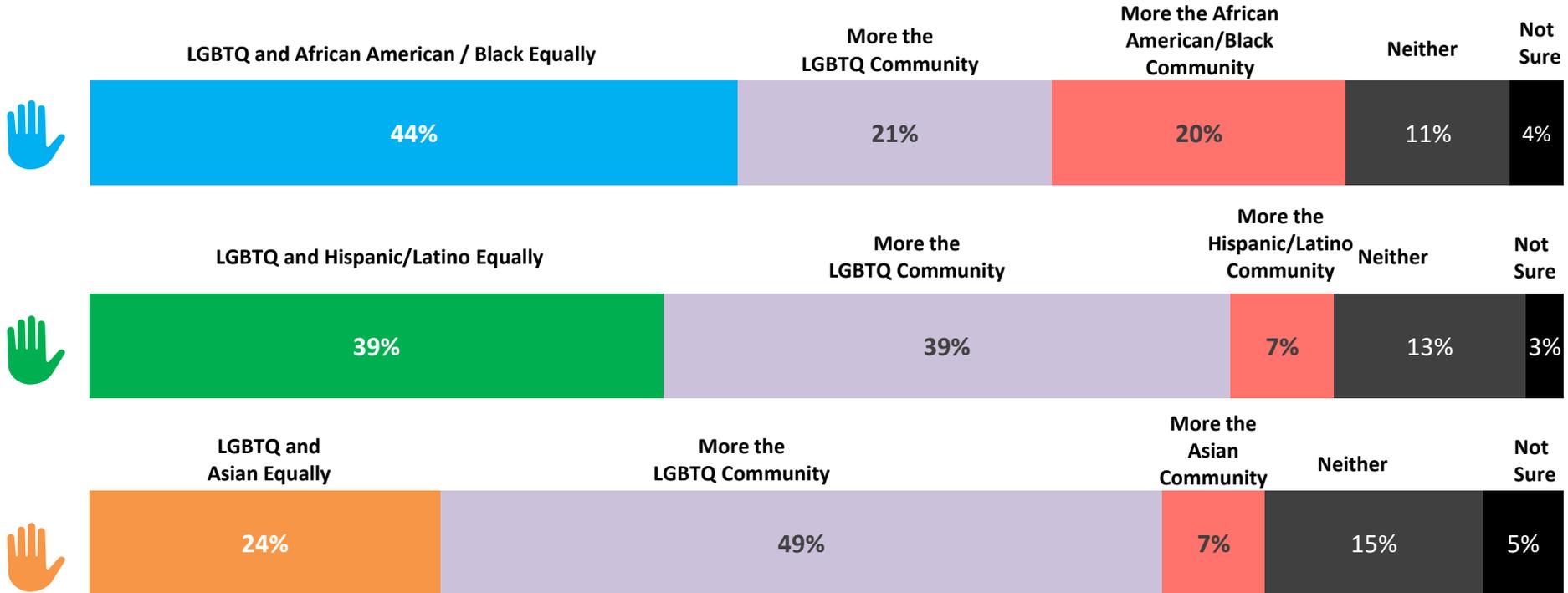
Agree 74% Neutral 23% Disagree 3%



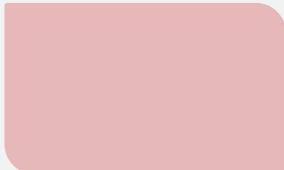
Base: Varies

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.

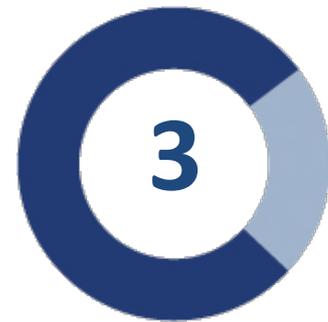


Base: African American / Black n=1,050; Hispanic/Latino n=1,413; Asian n=484



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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	Transgender and Non-Binary Participants
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

Top 4 Health Concerns By Gender and Generation

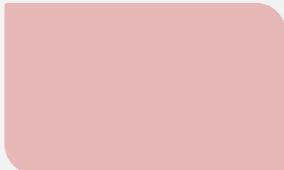
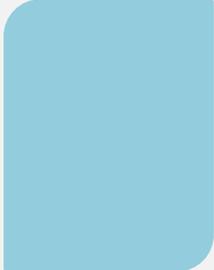
Which of the following health and injury issues are you most concerned about for yourself, personally? Please limit your choices to those that are of most concern to you.	Gay and Bisexual Men			Lesbian and Bisexual Women			Transgender and Non-Binary Participants		
	Millennials	Generation X	Baby Boomers	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

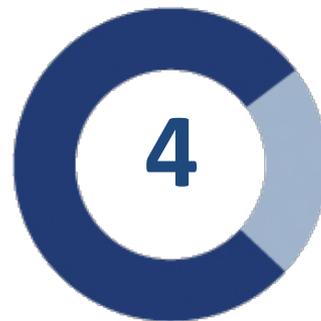
In which sports/exercise did you participate in the past 30 days? (Please mark all that apply)	Gender			Generation		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Transgender and Non-Binary Participants	Millennials	Generation X	Baby Boomers
Walking	69%	75%	69%	71%	72%	73%
Using cardiovascular equipment	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



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

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



**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.

Do you agree or disagree with these statements?		USA 		Canada 	
		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

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 LGBTQ	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



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Purchasing

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

FOR MORE INFORMATION:

CMI's highly specialized services are based on 25 years of dedicated experience, producing LGBTQ market intelligence for leading corporate, university, government and non-profit clients 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:

- Financial Outlook
- Purchasing Behavior
- Media Consumption
- Living Environment
- Terminology
- LGBTQ Social / Peer Circles
- Brand 'LGBTQ friendliness'
- Social Concerns
- Technology
- Segments Within LGBTQ
- Travel Behavior
- Motivations
- Sports and Recreation
- Social Media Habits
- Product Categories
- **Custom Surveys, Focus Groups, In-Depth Interviews and other research methodologies**



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LGBTQ Research Panel 2019

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 80,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



60,000

LGBTQ Panelists
in the USA



7,500

LGBTQ Panelists
in Canada
(English + French Speaking)



4,500

LGBTQ Panelists
in China



Capabilities in the
UK, Germany,
Australia and other
countries



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

20,000+

Lesbian and
bisexual women



30,000+

Gay and
bisexual men



3,000

Transgender
community
members



7,000

Bisexual
community
members



5,000 With an HHI
Over \$150,000



5,000 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.



18,000

Representing
the LGBTQ
community
of color



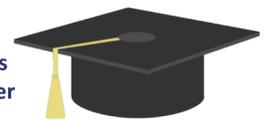
20,000

LGBTQ
Millennials



10,000

With a master's
degree or higher



4,000

LGBTQ parents with
a child under 18
living at home



10,000

Legally married
same-sex couples



LGBTQ youth research
experience

(in partnership with an
institution and IRB approval)



LGBTQ Research and Corporate Training

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

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

LGBTQ Market Research:

There is a difference!

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

Community Marketing & Insights (CMI) leverages our own proprietary panel to generate the valid data that our clients depend on. As an LGBTQ-founded 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 300 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 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 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-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.