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CMICommunity Marketing \& Insights Leaders in LGBTQ Research since 1992

## $13^{\text {th }}$ Annual

## LGBTQ Community Survey ${ }^{\circledR}$

## USA Summary Report

 July 2019Sponsored by:
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## ABOUT CMI: 25+ YEARS OF LGBTQ INSIGHTS

Community Marketing \& Insights (CMI) has been conducting LGBTQ consumer research for over $\mathbf{2 5}$ 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 $13^{\text {th }}$ 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 $\mathbf{1 3 0}$ 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 $\mathbf{1 1 , 6 3 9}$ USA participants aged 18 to 77 .


## HIGHLIGHTS FROM CMI's 12th COMMUNITY SURVEY

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


GRAB A COFFEE. TAKE A SURVEY. CHANGE THE WORLD. MAKING A DIFFERENCE IS EASY.
Take the 13th Annual LGBTQ Community Survey ${ }^{\text {® }}$
Join 45,000 LGBTQ citizens from 150 countries
to take the largest survey of its kind!
LGBTQsurvey.com
C CMI Community Marketing \& Insights



## ABOUT CMI's $13^{\text {th }}$ ANNUAL LGBTQ COMMUNITY SURVEY METHODOLOGY \& ASSUMPTIONS

## IDENTITY

The Community Marketing \& Insights (CMI) Annual LGBTQ Community Survey ${ }^{\circledR}$ 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 $13^{\text {th }}$ ANNUAL LGBTQ COMMUNITY SURVEY <br> METHODOLOGY \& ASSUMPTIONS

USA Report<br>Completes $\mathrm{n}=11,639$ participants<br>All 50 states represented<br>- 26\% from CMI panel<br>- 74\% from 201 participating LGBTQ media and organization partners<br>Global Participation in Research $\mathrm{n}=32,514$ 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.

## A 文 THE SURVEY WAS FIELDED 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 $13^{\text {th }}$ 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 OUTIoud
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 Guid Harlem Pride
Harlem2020
He Said Magazine
Hep
Hotspots Media Group
Humen Media Group
ImageOut - The Rochester LGBTQ Film Festiva
In the Life Atlanta
Infolettre de Fugues Inside Out LGBT Film Festival InterPride
Kalamos Care

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## CMI's $13^{\text {th }}$ ANNUAL LGBTQ COMMUNITY SURVEY • RESEARCH PARTNERS (2/2)

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

| Las Vegas PRIDE | Outword |
| :--- | :--- |
| Lesbian News | Outword California |
| Lesbian.com | PeachATL Magazine |
| LGBT Chamber of Commerce of Illinois | Peacock Panache |
| LGBT Community Center of Colorado (The Center) | Pink Banana Media |
| LGBT Community Center of the Desert, The | Pink Spots/Rhineaux Media Corp. |
| LGBT+ Center Orlando, Inc. | Plexus LGBT \& Allied Chamber of Commerce |
| LGBTQ Welcome Center | Plus/hivplusmag.com |
| LGBTWeddings.com | Polk Pride FL |
| Los Angeles Blade | Pop Luck Club |
| Love Inc. Magazine | POZ |
| Maryland LGBT Chamber of Commerce | Pride Journeys |
| MEGA Personalities | Pride Winnipeg Festival Inc. |
| METRA MAGAZINE | pride.com |
| Metro Weekly | PrideGuide®USA |
| Miami-Dade Gay \& Lesbian Chamber of Commerce | Pridelines |
| Mid-America GLCC | Pridezillas LLC |
| misterb\&b | Prizm |
| Moovz | Project MORE Foundation |
| Muskoka Pride | Project Q Atlanta \| Q Magazine |
| My Gay Houston | Project OUT |
| NAGLREP | Proud FM |
| Nashville LGBT Chamber of Commerce | Q Magazine Key West |
| National Queer Asian Pacific Islander Alliance (NQAPIA) | Q Media Virginia |
| NJ LGBT Chamber | Q Voice News |
| OBX Pride, Inc. | QNotes / goqnotes.com |
| ONE Community | QSaltLake Magazine |
| One lowa | Rage Monthly Magazine |
| OUT FRONT Magazine | Rainbow 411 |
| Out Professionals | Rainbow Chamber Silicon Valley |
| Out/out.com | Rainbow Times, The |
| OutClique, LLC | Raynbow Affair Magazine |
| OutSmart Magazine | Reaching Out MBA, Inc |
| outtraveler.com | 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? <br> Among All 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 is 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.

$\left.\begin{array}{c|c|c|c|}\hline & \text { Gay \& Bisexual } \\ \text { Men }\end{array} \begin{array}{c}\text { Lesbian \& } \\ \text { Bisexual Women }\end{array} \begin{array}{c}\text { Transgender and } \\ \text { Non-Binary } \\ \text { Participants }\end{array}\right]$

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

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

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

| Millennial+ | 7\% | Lesbian \& Bisexual Women 28\% |
| :---: | :---: | :---: |
| Gen X | 18\% |  |
| Boomer+ | 5\% | Gay \& Bisexual Men |


17\%
Baby Boomer+ Have Grandchildren

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+



## 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, l'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 ( $\mathbf{5}+4$ ) 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 | $59 \%$ |

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 CommunityCMICommunity Marketing \& Insights

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 |  <br> Bisexual <br> Women | Gender- <br> Expansive | Millennial+ | $\begin{aligned} & \text { Generation } \\ & \mathrm{X} \end{aligned}$ | Baby <br> 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

$\checkmark$ Only $30 \%$ favorable just using LGBT
$\checkmark \quad 61 \%$ favorable using a term that includes Q or the word Queer.
$\checkmark \quad 25 \%$ 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 |  <br> Bisexual <br> Women | Gender- <br> Expansive | Millennial+ | Gen X | Boomer+ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| LGBT | 30\% | 40\% | 23\% | 17\% | 20\% | 32\% | 38\% |
| LgBta | 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\% |
| lgbtaiat | 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\% |



## Media

 and EventsImportance 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

Impact greater when companies advertise in the general population media

Impact greater when companies advertise in the LGBTQ media

The impact is about equal

12\% Neither has impact

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?


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\% |

Which of the following social platforms have you used in the past $\mathbf{3 0}$ days? Please mark all that apply. Among All LGBTQ


Which of the following social platforms have you used in the past $\mathbf{3 0}$ days? Please mark all that apply. By gender and generation:

|  | All LGBTQ | Gay \& Bisexual Men |  <br> Bisexual <br> Women | Gender- <br> Expansive | Millennial+ | $\begin{aligned} & \text { Generation } \\ & X \end{aligned}$ | Baby Boomer+ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| facebook. | 84\% | 82\% | 86\% | 80\% | 84\% | 86\% | 82\% |
| - YouTube | 82\% | 83\% | 80\% | 84\% | 87\% | 83\% | 75\% |
| (0) Instagram | 55\% | 55\% | 56\% | 48\% | 77\% | 57\% | 30\% |
| Linkedin. | 44\% | 47\% | 42\% | 34\% | 46\% | 49\% | 36\% |
| twitkers | 41\% | 42\% | 40\% | 41\% | 49\% | 44\% | 30\% |
| Pinterest | 24\% | 18\% | 30\% | 26\% | 25\% | 26\% | 21\% |
| ( WhatsApp | 23\% | 28\% | 20\% | 15\% | 28\% | 24\% | 17\% |
| $\int_{5}$ 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\% |

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:

|  | $\begin{gathered} \text { All } \\ \text { LGBTQ } \end{gathered}$ |  <br> Bisexual <br> Men | Lesbian \& Bisexual Women | Transgender <br> / Non-Binary <br> Participants | Millennial+ | $\begin{gathered} \text { Generation } \\ \mathrm{X} \end{gathered}$ | 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\% |



## 5

## LGBTQ

 Consumer PurchasingBrand 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.


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.


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.


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?

Among All LGBTQ

"Yes" Among...


## 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\% |



## 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 <br> (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 | $48 \%$ | $58 \%$ | $49 \%$ | $38 \%$ |  |  |  |  |  |  |
| (e.g. SiriusXM, Pandora, Spotify, Apple Music) | $3 \%$ | $3 \%$ | $2 \%$ | $3 \%$ |  |  |  |  |  |  |
| None of the above |  |  |  |  |  |  |  |  |  |  |



## 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 <br> $+$ | Gen X | Boomer+ | Millennial <br> $+$ | Gen X | Boomer+ | Millennial <br> $+$ | 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?


## 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:

| I iim | All LGBTQ |  <br> Bisexual <br> Men |  <br> Bisexual <br> Women | Gender- <br> Expansive | Millennial+ | Generation X | Baby <br> Boomert |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 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\% |

## 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...



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## Highlights from CMI's $12^{\text {th }}$ LGBTQ Community Survey ${ }^{\circledR}$

## USA Report <br> June 2018

This report contains an additional section featuring insights from our $12^{\text {th }}$ 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.


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Impact of Outreach to the LGBTQ<br>Community

CMI's 12th Annual LGBTQ Community Survey ${ }^{\circledR}$ • 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



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



85\% Agree
13\% Neutral
2\% Disagree

## "I tend to support companies that market to and support the LGBTQ community."



## 78\% Agree 20\% Neutral 2\% Disagree

CMI's 12th Annual LGBTQ Community Survey ${ }^{\circledR}$ • 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



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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.

| Agree Neutral Disagre |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Corporations/companies do a good job outreaching to the transgender / genderexpansive community | Gender-Expansive | 6\% | 25\% |  |  |  |
|  | All LGBT | 5\% | 31\% |  |  |  |
| I feel more positive towards companies that include transgender / gender-expansive community imagery in their outreach communications | Gender-Expansive |  |  | 86\% |  |  |
|  | 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\% |  | $2 \%$ |
|  | All LGBT |  |  | 74\% | 23\% | 4\% |

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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.

AgreeNeutralDisagree

| Corporations/companies do a good job <br> outreaching to the lesbian community | Among <br> Lesbian <br> Participants | $\mathbf{5 \%}$ | $\mathbf{3 7 \%}$ |  |
| :--- | :---: | :---: | :---: | :---: |
| I feel more positive towards companies that <br> include lesbian community imagery in their <br> outreach communications | Among <br> Lesbian <br> Participants |  |  |  |
| I would be more likely to support and purchase <br> from companies that market to and support <br> the lesbian community | Among <br> Lesbian <br> Participants |  | $\mathbf{9 0 \%}$ |  |

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.


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\%

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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


Base: Varies

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\%

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 <br> you most concerned about for yourself, personally? <br> Please limit your choices to those that <br> are of most concern to you. | USA <br> ALL <br> 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 $n=18,743$
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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\% |

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 $\mathrm{n}=1,604$

## 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 | $\begin{gathered} \text { Generation } \\ \mathbf{x} \end{gathered}$ | Baby Boomers | Millennials | Generation $\mathbf{X}$ | 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.
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Exercise Activities in Past 30 Days by Gender and Generation

| In which sports/exercise did you participate in the past 30 days? <br> (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 $\mathrm{n}=12,934$; Cisgender Lesbian \& Bisexual Women $\mathrm{n}=4,205$;
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.


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 |
| :---: | :---: |
| LGBTQ discrimination | 76\% |
| Affordable healthcare | 66\% |
| Racial discrimination | 54\% |
| Climate change | 53\% |
| Women's equality in the workplace | 44\% |
| Affordable housing | 40\% |
| Marriage equality | 39\% |
| Poverty | 39\% |
| Sexual harassment | 34\% |
| Immigration reform | 29\% |
| Fake news | 27\% |
| Post-truth politics | 24\% |
| Cyber security | 22\% |
| Foreign wars or military conflicts | 21\% |
| Street / neighborhood violence | 20\% |
| High taxes | 19\% |
| Unemployment | 16\% |
| Terrorism | 16\% |
| Government regulation of business | 9\% |
| Inflation | 9\% |


| Major LGBTQ |
| :---: | :---: |
| Demographic Differences |
| High for all demographics |

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



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



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Purchasing

## LGBTQ Insurance Ownership By Generation

|  |  |  | USA Generation Breakout |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | Which of the following types of insurance do you have, if any? <br> (Please mark all that apply) | USA <br> ALL LGBTQ | Millennials | Generation X | Baby Boomers |
| (9) | Health insurance | 87\% | 86\% | 88\% | 88\% |
| (8) | Auto / car / motorcycle insurance | 81\% | 70\% | 85\% | 89\% |
| (1) | Dental insurance | 66\% | 67\% | 72\% | 60\% |
| (4) | Life insurance | 50\% | 40\% | 60\% | 50\% |
| (1) | Home owners insurance | 49\% | 20\% | 57\% | 70\% |
| (0) | Renters insurance | 25\% | 34\% | 24\% | 16\% |
| (8) | Long-term care insurance | 13\% | 7\% | 15\% | 18\% |
| (0) | Identity theft insurance | 9\% | 5\% | 10\% | 11\% |
| (11) | Business insurance | 7\% | 3\% | 9\% | 9\% |
| 0 | 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, <br> how many days did you eat meals in the <br> following ways? |
| :---: |
| Dinner at a restaurant |
| Lunch at a restaurant |
| Breakfast at restaurant |
| Food delivery or take out |

## LGBT Community and Pets

| Do you care for a <br> pet or companion <br> animal at home? | USA ALL <br> LGBT | Gay and <br> Bisexual <br> Men |  <br> Bisexual <br> Women | Gender <br> Expansive |
| :---: | :---: | :---: | :---: | :---: |
| Yes, I have a pet or companion <br> animals at home | $67 \%$ | $60 \%$ | $74 \%$ | $66 \%$ |

## 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

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


## Community Marketing \& Insights

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## CMICommunity Marketing \& Insights Leaders in LGBTQ Research since 1992

## 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


5,000 withan HH1 $^{\text {Over }} \$ 150,000$
5,000 withan HHI Below \$25,000

18,000 Representing the LGBTQ community of color

4,000
LGBTQ parents with a child under 18 living at home


20,000 lgBta Millennials


10,000 Legally married same-sex couples

Thousands of men living with HIV
Note: All health-related data is maintained independent of personally identifying information. targeting capability


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...| $\underbrace{\bigcirc}_{\text {thaget }}$ <br> TARGET | - | 10]mode | Hallmark Carda | \% directv | $\underset{\text { FARELS }}{\text { Wels }}$ |
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# LGBTQ Market Research: <br> 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 ${ }^{\circledR}$ 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 LGBTQoperated, 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 communitybased 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.


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