CMI Community Marketing & Insights
Community Marketing, Inc.

CMI's 8th Annual LGBT Community Survey®

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ABOUT US

CMI Community Marketing & Insights
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Community Marketing & Insights has been conducting LGBT consumer research since 1994. Our practice includes online surveys, telephone interviews, intercepts, focus groups (on-site and online), and advisory boards in North America and Europe. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.

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

CMI's research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: Prudential, Wells Fargo Bank, Aetna, Target Brands, SunTrust Bank, Johnson & Johnson, WNBA, OraSure, Credit Suisse, Esurance, Merz Radiesse, Absolut Vodka, NYC & Co., Visit Philadelphia, Las Vegas CVA, Hyatt Hotels Corp., Tourism Toronto, Tourism Office of Spain, Hawaiian Airlines, United States Census Bureau, American Cancer Society, Kaiser Family Foundation and numerous other corporations and organizations across North America and around the world.

ABOUT THE SURVEY

METHODOLOGY

This comprehensive online survey on LGBT consumers was made available through an email invitation to survey panelists, as well as on the websites, email lists and social media of our 170+ LGBT media and organization partners.

Importantly, our sample reflects the readership/membership of this broad range of LGBT focused media outlets, organizations and events. This means that the results summarized here are highly representative of consumers who are interacting with the LGBT community.

SURVEY RESPONDENTS

Over 34,000 respondents across more than 123 countries completed the survey.

This report focuses on U.S. data for over 9,300 self-identified gay and bisexual men, over 3,500 lesbian and bisexual women and over 400 transgender community members.

Respondents were recruited from CMI's proprietary research panel and 170+ LGBT media outlets and partner organizations.

CMI's 8th Annual LGBT Community Survey®

THANKS TO OUR 2014 SPONSORS

WELLS FARGO — Together we'll go far

a&u AMERICA'S AIDS MAGAZINE

…AND OUR OUTSTANDING PARTNERS!

PINK TRIANGLE PRESS

ADELANTE

2014

In partnership with Rivendell Media, CMI's 2014 LGBT Community Survey respondents were referred from LGBT research partners (media, events and organizations).

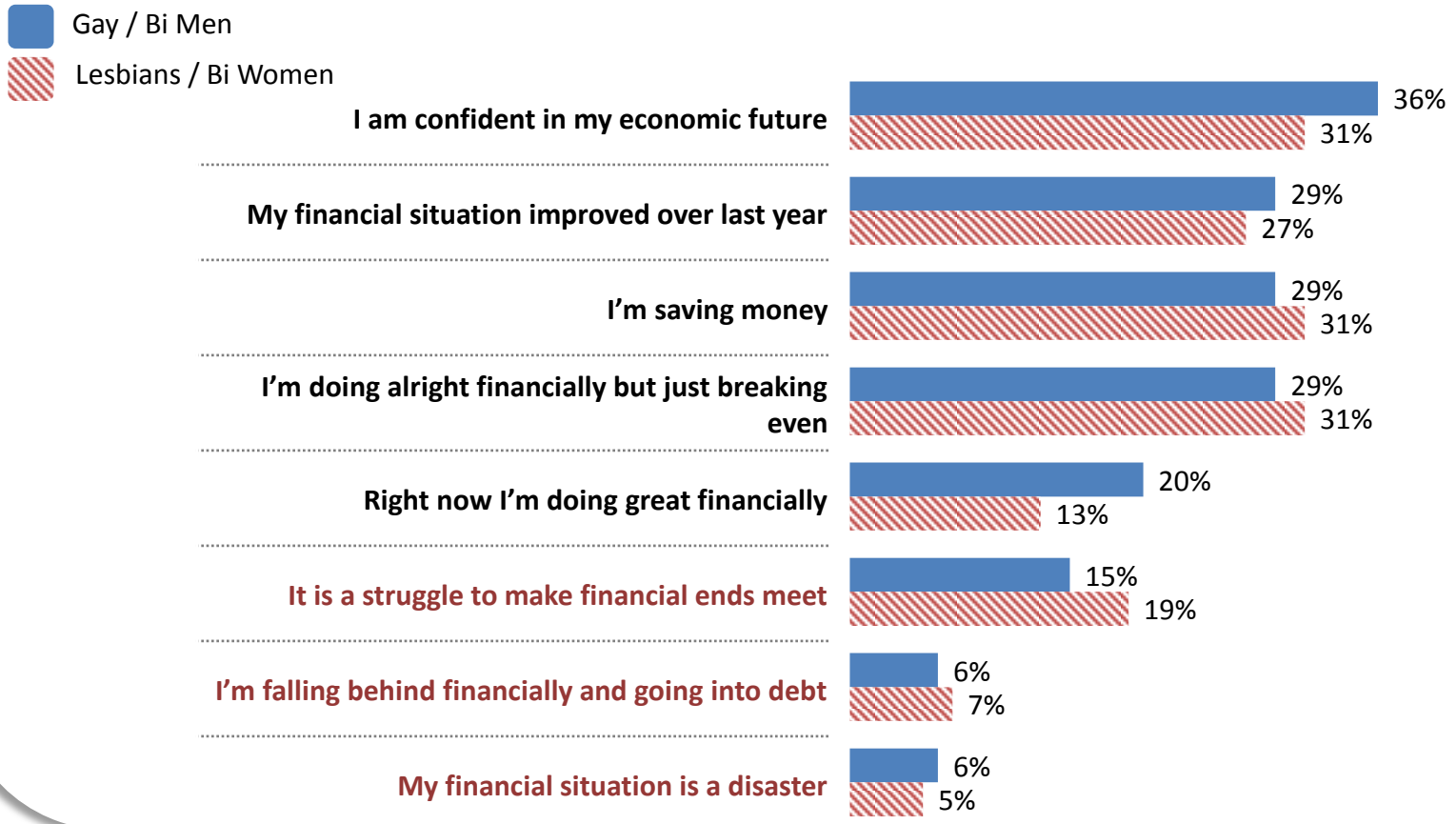
- 103.9 PROUD FM
- A&U Magazine
- ADELANTE MAGAZINE
- Affirmations
- AfterEllen.com
- AIDSmeds.com
- Altus Agency
- AMERICABlog
- Aqua Foundation
- Austin PRIDE
- Autostraddle.com
- Baltimore OUTloud
- Bay Area Reporter
- Bay Windows
- Bear Bash Events LLC
- Bear World Magazine
- Between The Lines
- Bisexual Resource Center
- Boston Pride
- BoyCulture
- Camp magazine
- CenterLink
- ChicagoPride.com
- Chris Ryan Productions & Promotions, LLC
- Christopher Street West / LA PRIDE
- Cilantro Creative
- Circle of Voices Inc.
- Columbia FunMap, Inc.
- COME OUT WITH PRIDE ORLANDO
- Compete Magazine
- Connextions Magazine
- Curve Magazine
- DailyXtra.com
- DailyXtra.com/Travel
- Dallas Voice
- Dattch
- DAVID ATLANTA
- DBQ Magazine
- DECORHOMME
- Delta Foundation of Pittsburgh/Pittsburgh Pride
- Diversity Rules Magazine
- DNA Magazine
- Echelon Magazine
- EDGE Media Network
- Equality Michigan
- Erie Gay News
- Federation of Gay Games
- FENUXE Magazine
- FLAME Magazine
- Frameline: San Francisco International LGBT Film Festival
- Frontiers Media
- FUGUES
- Fugues.com
- GA Voice
- Gay City News
- Gay San Diego
- Gayborhood
- GayCalgary Magazine
- GayCities
- GayDirect
- Gayosphere / FunMaps
- GAYtoZ DIRECTORY
- Gayvan.com Travel Marketing
- GayWhistler | WinterPRIDE
- GC Magazine
- Genre Latino Magazine
- GFLGLCC - Greater Fort Lauderdale Gay & Lesbian Chamber of Commerce
- Global Network of Black Pride
- GRAB Magazine
- Greater Houston CVB/MyGayHouston.com
- Greater Seattle Business Association (GSBA)
- Greg in Hollywood
- Grindr, LLC
- GSHRadio.com
- GUIDE ARC EN CIEL/QUEBEC RAINBOW GUIDE
- He Said Magazine
- Hebro | Gay Jews
- HepMag.com
- Hotspots Magazine
- ImageOut, Rochester's LGBT Film Festival
- INBA - Inland Northwest Business Allinace
- International LGBT Football Calendar
- Jason B
- JoeMyGod
- Kenneth in the 212
- Key West Business Guild, Inc.
- L Style G Style
- Las Veges Pride
- Lesbian News
- Lesbian.com
- Lexington Pride Festival
- LGBT Football Calendar
- LGBT/JAX Business Directory
- LGBTfeed.com
- Logo TV
- LOTL
- Mark's List
- Metro Weekly
- Mid-South Pride
- MyRainbowPages.com
- NAGLREP, The National Association of Gay & Lesbian Real Estate Professionals
- New Civil Rights Movement
- New Orleans Pride
- NewNowNext.com
- Next Magazine
- Odyssey Magazine
- OmgBlog
- ONE Community
- Our Lives magazine
- Out & About Nashville
- Out Front
- Out In Jersey magazine
- OUT Online
- Out Professionals
- OutcomeBuffalo.com
- OutSmart Magazine
- OutSpokane
- OUTtv Network
- Pink Banana Media
- POZ - POZ.com
- PQ (Proud Queer) Monthly
- PQ Monthly Newspaper
- Pride Festival of Central PA
- Pridezillas
- Programmatic Ad Buy
- Project Q Atlanta
- Q Magazine
- QNotes
- QSaltLake
- Queer Humboldt
- QVegas Magazine
- RAGE MAGAZINE
- Rainbow411
- Raynbow Affair Magazine
- RealHealthMag.com
- San Diego LGBT Weekly
- San Francisco Bay Times
- SaneMag.com
- Smart + Strong
- South Florida Gay News
- Southern Comfort Conference
- SquareHippies
- Squirt
- Tagg Magazine
- THE FIGHT MAGAZINE LOS ANGELES
- The Gay & Lesbian Review Worldwide
- The Gayly
- The Montrose Center
- The Rainbow Times
- The Standard Magazine
- TheBacklot.com
- thenewsGayper.com
- therepubliq
- Towleroad
- Travel Queery
- TuSaludMag.com
- UNITE Magazine
- Washington Blade
- Windy City Times
- Wisconsin Gazette
- Wolfe Video
- Xtra Ottawa
- Xtra Toronto
- Xtra Vancouver
- ZIP MAGAZINE

1

Financial Confidence and Concerns

Economic Confidence: Overall 45% of LGBT participants indicated at least one positive economic answer, 25% indicated at least one negative economic answer, and 30% were neutral.

How would you describe your current financial situation? (Mark all that apply)



Bases: Gay and Bisexual Men n=9,325; Lesbians and Bisexual Women n=3,474

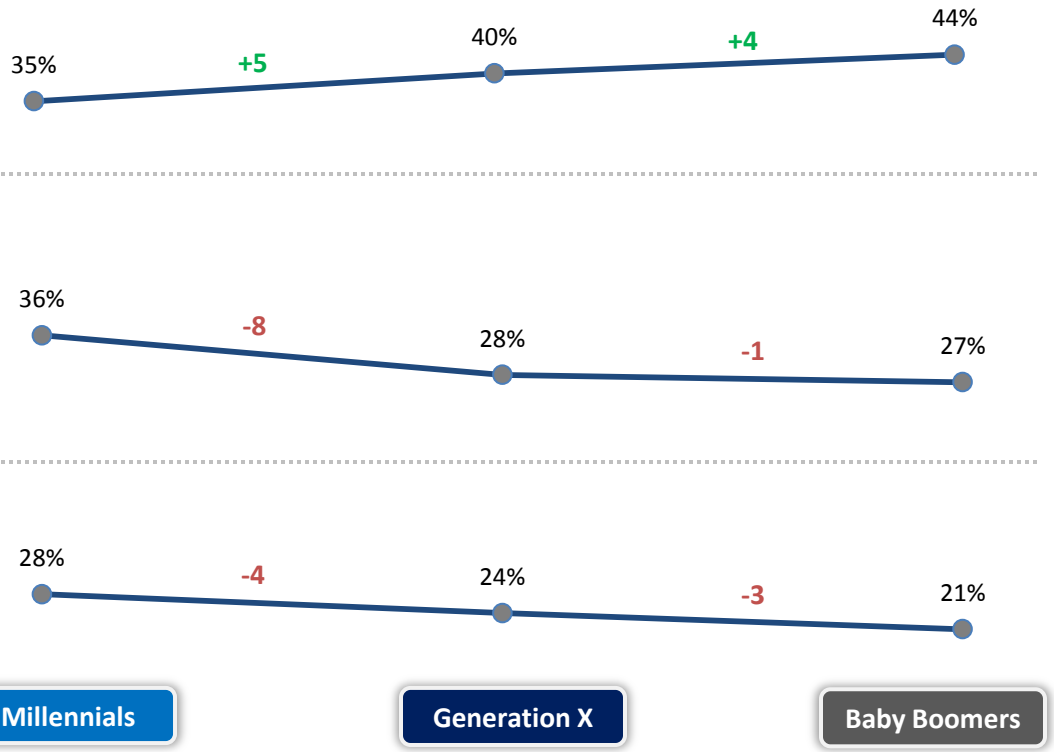
Economic Confidence by Generation: Older LGBTs are far more financially confident than younger LGBTs.

How would you describe your current financial situation? (Mark all that apply)

Positive
Right now I'm doing great financially or I'm confident in my economic future.

Neutral
I'm doing alright financially but just breaking even.

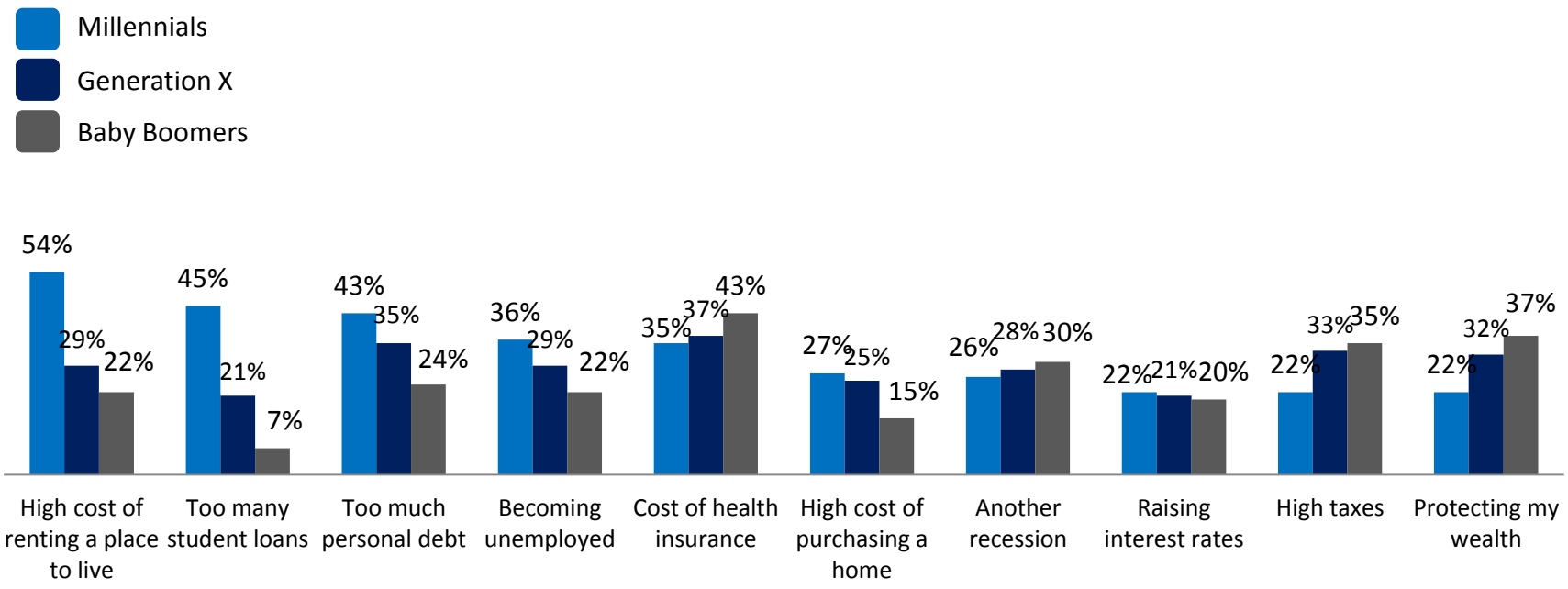
Negative
It is a struggle to make financial ends meet, I'm falling behind financially and going into debt, or My financial situation is a disaster.



Bases: Millennial Generation (1987-1981) n=3,282; Gen X (1980-1965) n=4,068; Baby Boomers (1964-1946) n=5,613

Financial Concerns by Generation: Financial concerns are quite different by generation. Millennials are most concerned about the high cost of renting and student loans. Baby boomers are most concerned about the high cost of health care and protecting their wealth.

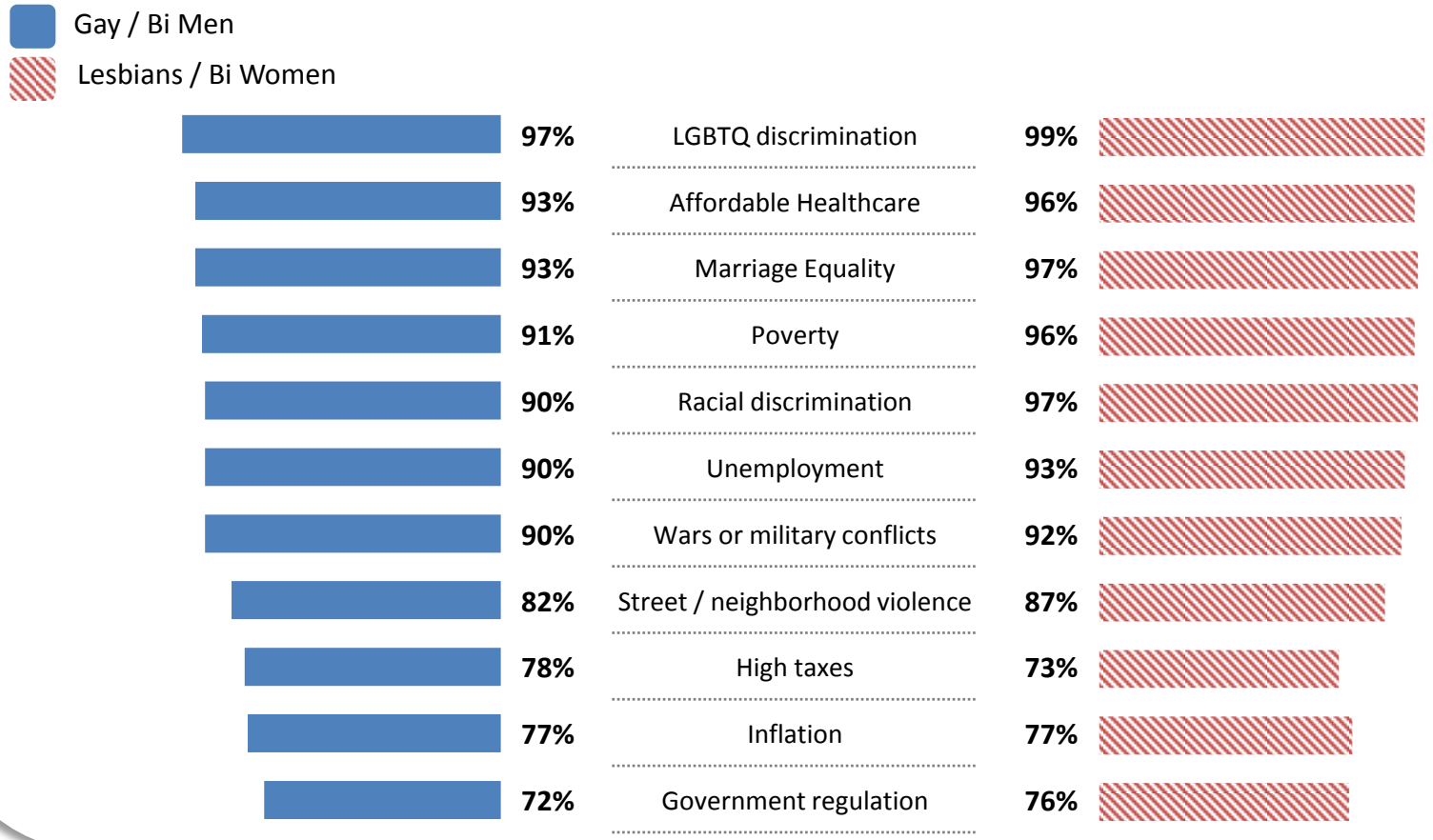
How concerned are you about the following issues affecting your own personal financial life?
(If not applicable to your life, mark "not concerned.")
% Very Concerned



Bases: Millennial Generation (1987-1981) n=3,170; Gen X (1980-1965) n=4,068; Baby Boomers (1964-1946) n=5,613

Political/Social Concerns: When asked about social concerns, LGBT discrimination, affordable healthcare and marriage equality rose to the top.

Which of the following political and social issues are you most concerned about?
% Somewhat to Very Concerned



Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513

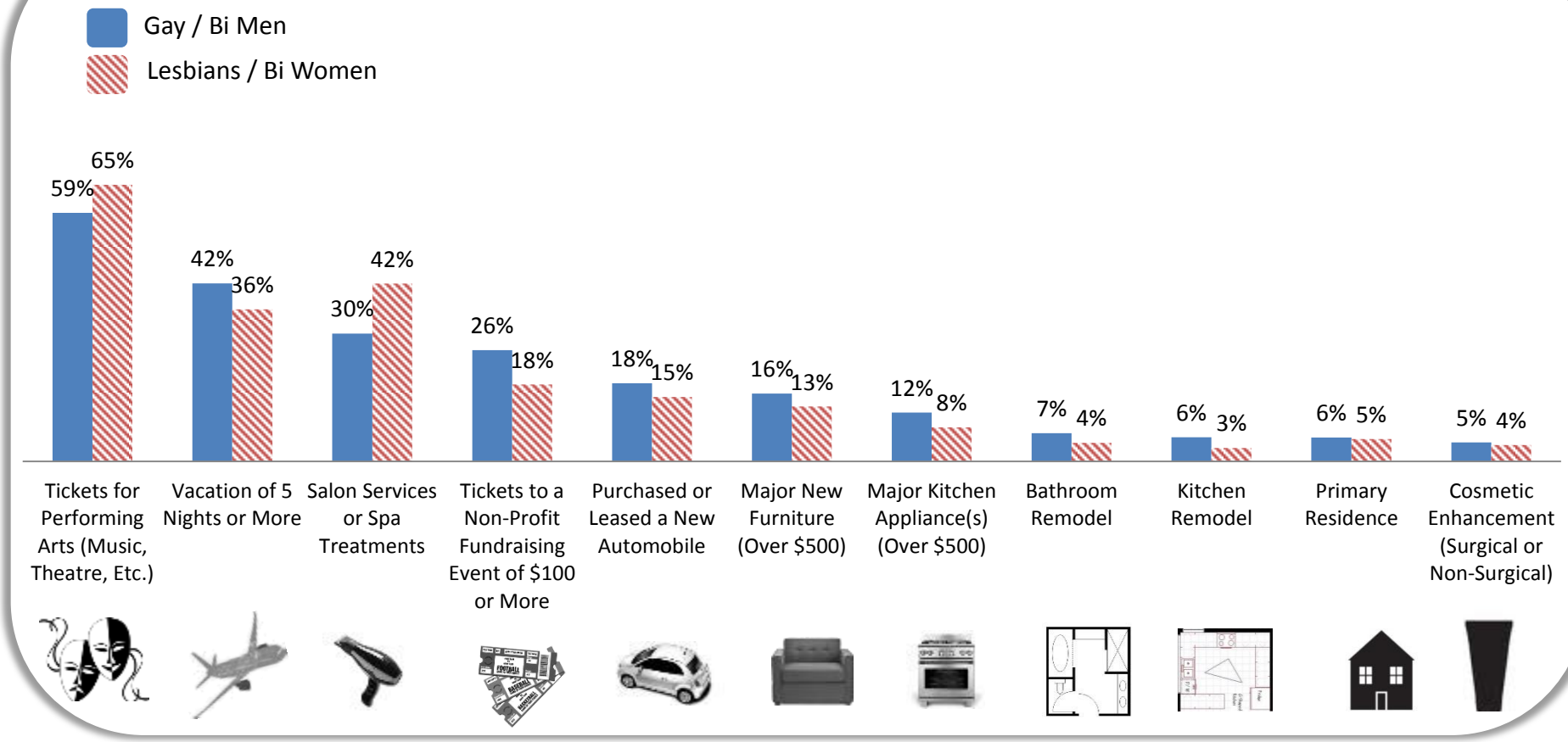
2

Purchasing Behavior (Past Year)

Purchases: Of the product categories tested in both 2013 and 2014, purchases were nearly identical when comparing years.

Please let us know about your purchases over the past year, and planned purchases over the coming year. (If an item does not apply, skip to the next line.)

Past 12 Month Purchases

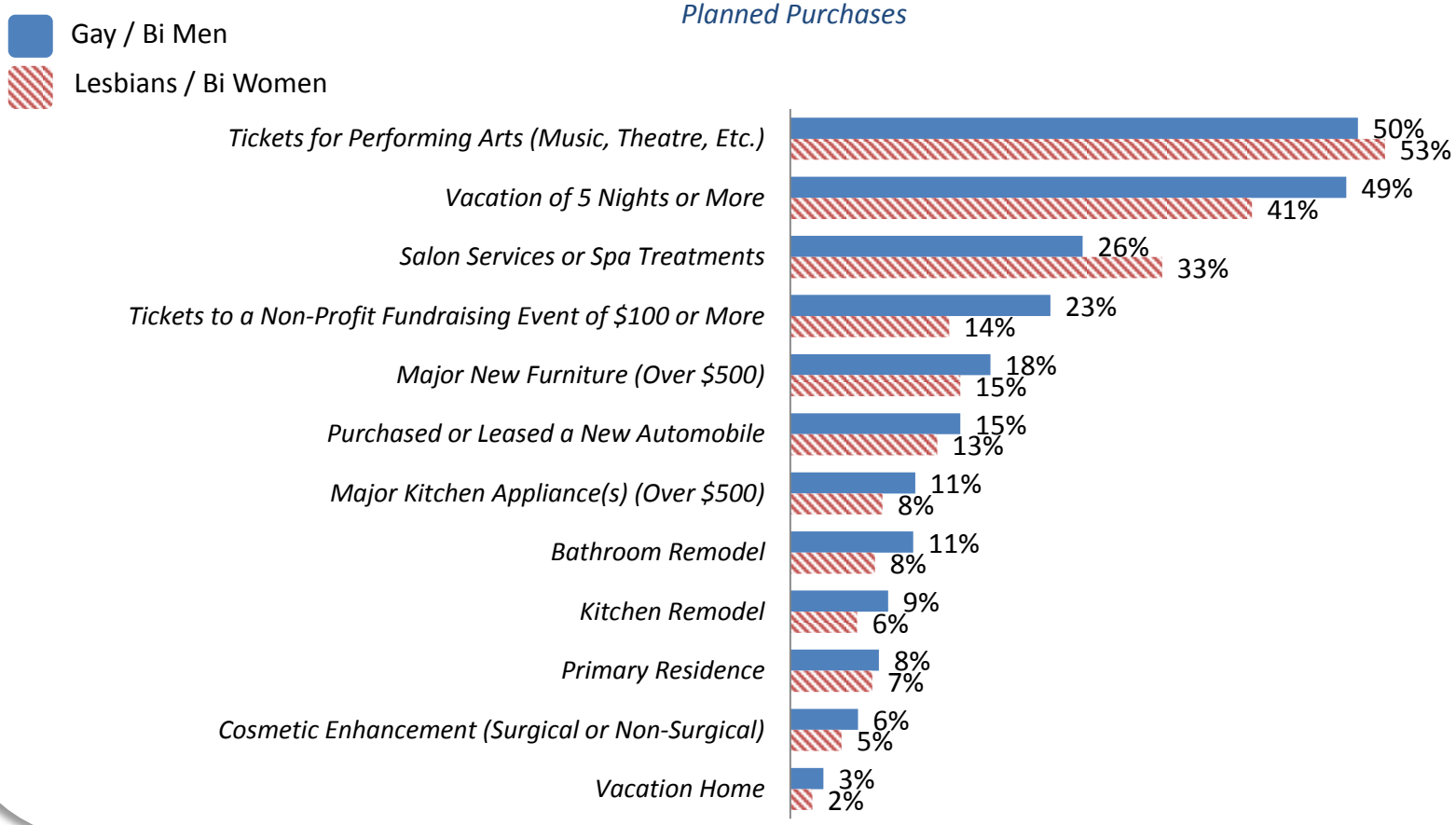


Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513

Future Purchases: Similarly, of the product categories tested in both 2013 and 2014, planned purchases were nearly identical when comparing years.

Please let us know about your purchases over the past year, and planned purchases over the coming year. (If an item does not apply, skip to the next line.)

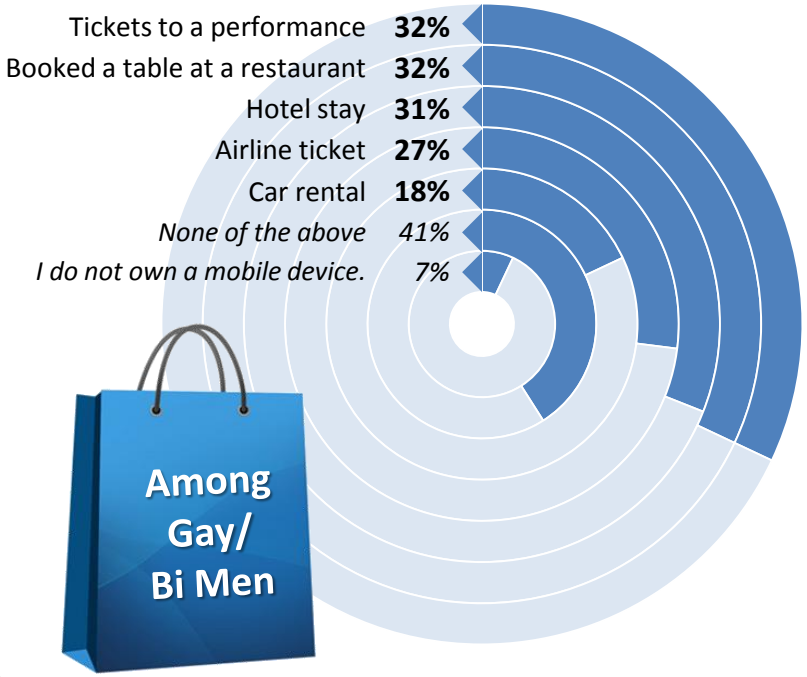
Planned Purchases

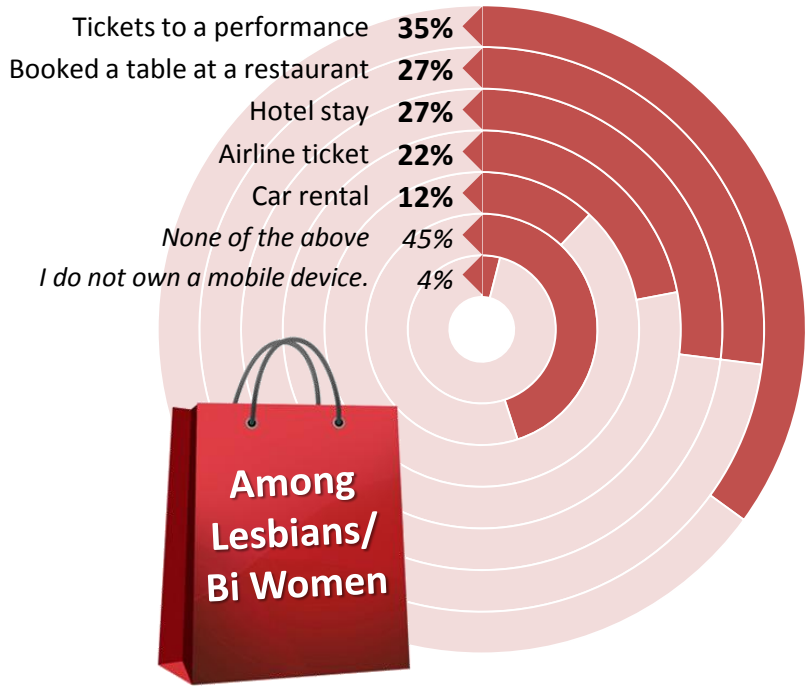


Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513

Mobile Purchases: Over half of LGBTs have used a mobile device to purchase an entertainment or travel product in the past year (by gender).

In the past year, have you purchased any of these products on your mobile device?
(Mark all that apply)

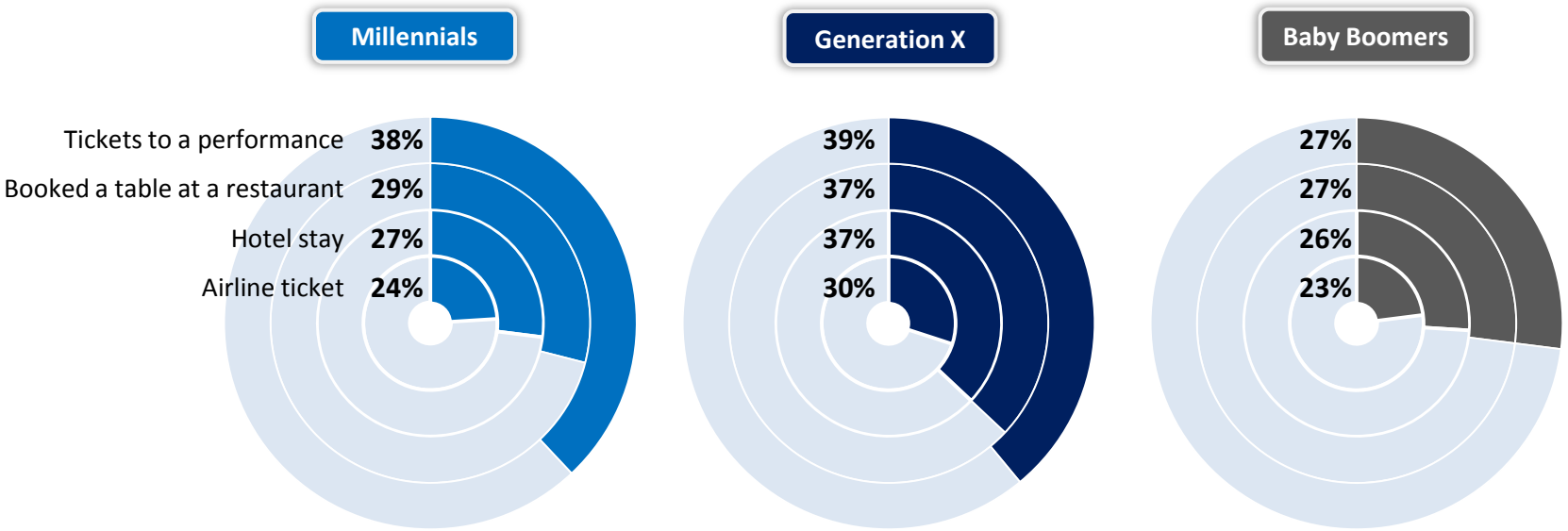




Bases: Gay and Bisexual Men n=9,228; Lesbians and Bisexual Women n=3,452

Mobile Purchases: Over half of LGBTs have used a mobile device to purchase an entertainment or travel product in the past year (by generation).

In the past year, have you purchased any of these products on your mobile device?
(Mark all that apply)



Bases: Millennial Generation (1987-1981) n=3,223; Gen X (1980-1965) n=4,000; Baby Boomers (1964-1946) n=5,526

3

Beverage Consumption

Weekly Alcohol Consumption: Again in 2014, spirits outperform beer and wine for gay men. For the first time, spirits was also the top-performing category for lesbians.

Percentage of participants who consumed one or more of the following beverages in the past seven days.

	Gay/Bi Men 18-29	Gay/Bi Men 30-44	Gay/Bi Men 45-59	Lesbians/Bi Women 18-29	Lesbians/Bi Women 30-44	Lesbians/Bi Women 45-59
Beer	51%	49%	40%	49%	45%	40%
Wine	45%	45%	44%	39%	31%	39%
Spirits/ Cocktails	62%	58%	51%	48%	46%	41%

Bases: Gay and Bisexual Men: 18-29 n=973; 30-44 n=2,208; 45-59 n=4,037; Lesbians and Bisexual Women: 18-29 n=1,030; 30-44 n=1,029; 45-59 n=999

Weekly Alcohol Consumption: Transgender community alcohol consumption is less than gay men and lesbians.

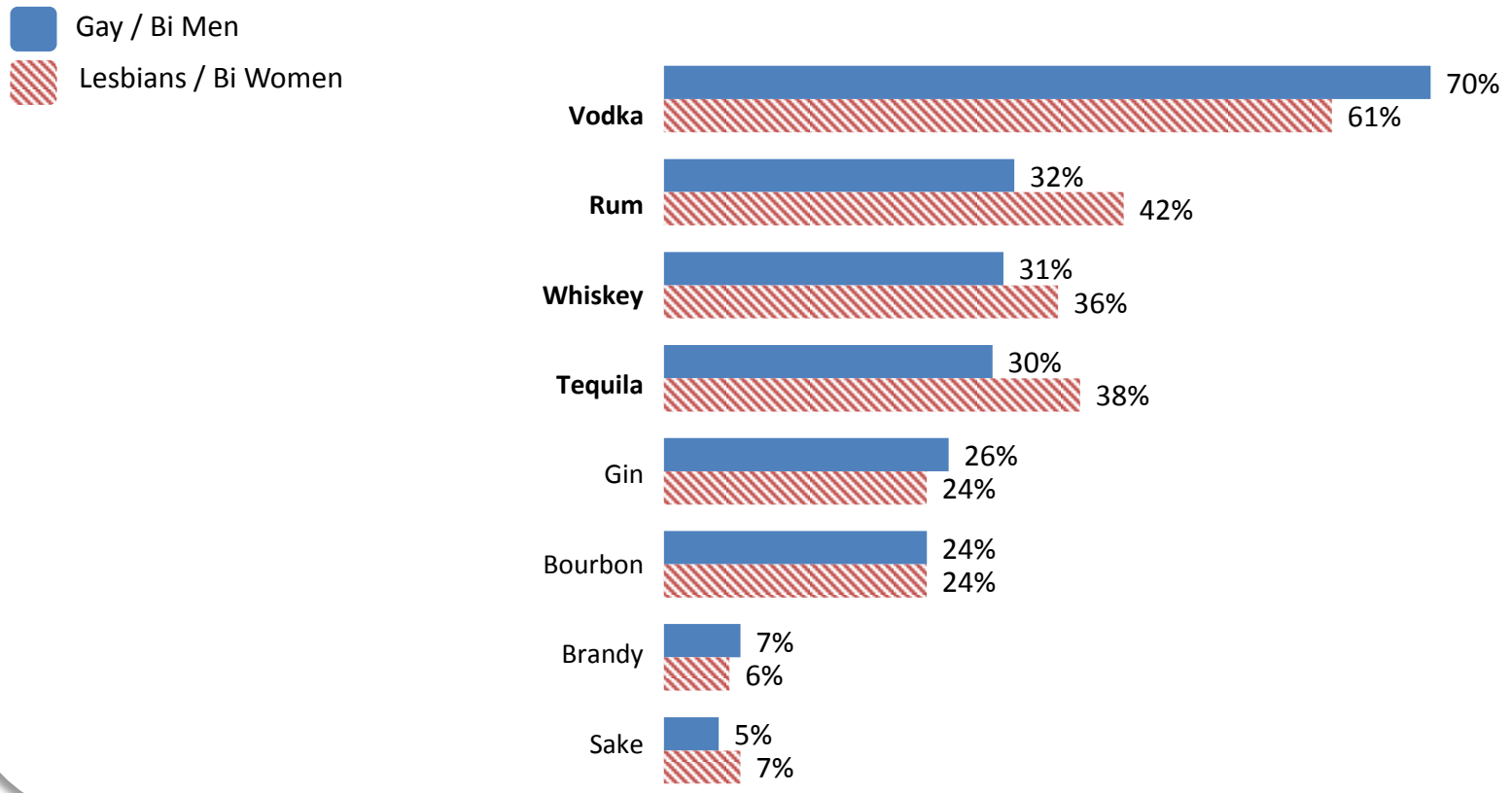
Transgender Alcohol Consumption

	Had at Least 1 Drink in Past 7 Days
Beer	41%
Wine	33%
Spirits/Cocktails	37%

Bases: Transgender n=441

Spirits Preferences: By far, vodka is the spirit of choice for gay men and lesbians.

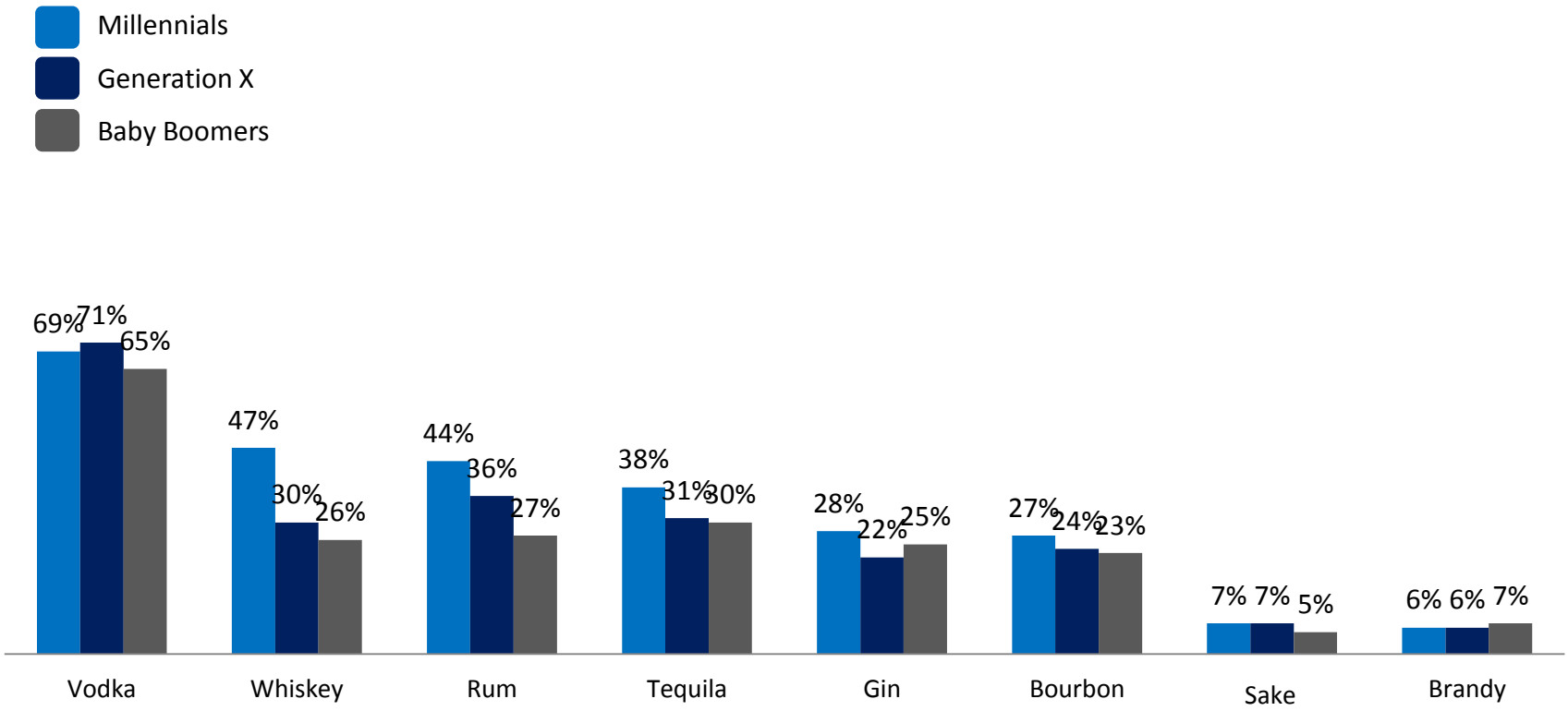
You said that you consume spirits / cocktails.
Which types of spirits are you most likely to drink? (Mark all that apply)



Bases: Gay and Bisexual Men n=4,870; Lesbians and Bisexual Women n=1,501

Spirits Preferences (Generation): By far, vodka is the spirit of choice for all generations.

You said that you consume spirits / cocktails.
Which types of spirit drinks are you most likely to drink? (Mark all that apply)



Bases: Millennial Generation (1987-1981) n=1,736; Gen X (1980-1965) n=2,119; Baby Boomers (1964-1946) n=2,493

LGBT Wine Preferences by Gender: Wine preferences are quite diverse for both gay men and lesbians.

You said that you consume wine.
Which types of wine are you most likely to drink? (Mark all that apply)

	Cabernet Sauvignon	Pinot Noir	Merlot	Pinot Gris	Chardonnay	Malbec	Syrah/ Shiraz	Sauvignon Blanc	Zinfandel	Riesling	Moscato	Sangiovese	Gewürz
Gay / Bi Men	47%	44%	41%	40%	36%	35%	32%	29%	28%	24%	17%	12%	10%
Lesbians / Bi Women	39%	40%	33%	37%	30%	30%	26%	26%	29%	28%	28%	11%	10%

Bases: Gay and Bisexual Men n=4,258; Lesbians and Bisexual Women n=1,398

LGBT Wine Preferences by Generation: Wine preferences are quite diverse across generations.

You said that you consume wine.
Which types of wine are you most likely to drink? (Mark all that apply)

	Pinot Gris	Cabernet Sauvignon	Pinot Noir	Moscato	Chardonnay	Riesling	Merlot	Sauvignon Blanc	Malbec	Zinfandel	Syrah/ Shiraz	Gewürz	Sangiovese
Millennials	42%	40%	39%	35%	33%	32%	32%	29%	29%	25%	21%	10%	7%
Generation X	38%	43%	43%	23%	31%	28%	36%	26%	36%	27%	34%	11%	13%
Baby Boomers	38%	48%	45%	12%	36%	21%	42%	28%	35%	31%	34%	9%	14%

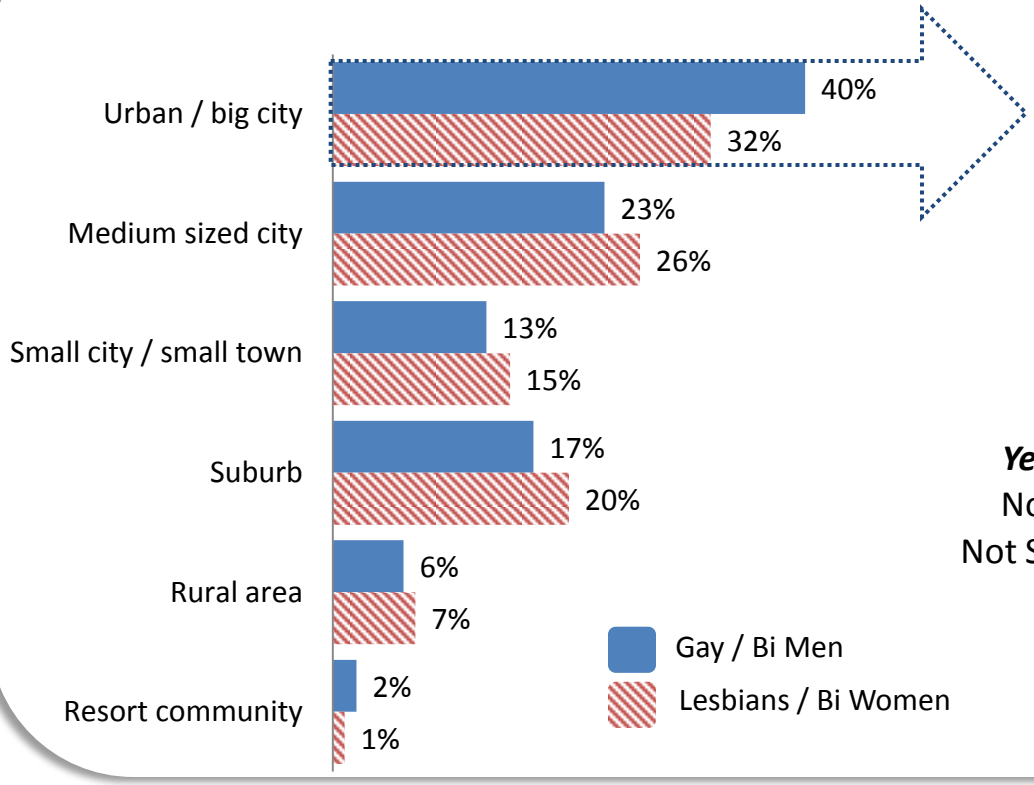
Bases: Millennial Generation (1987-1981) n=1,372; Gen X (1980-1965) n=1,713; Baby Boomers (1964-1946) n=2,457

4

Real Estate

Where LGBTs Live: LGBTs are living in all types of communities, big and small. Gay men are more likely than lesbians to live in big cities, while lesbians are more likely than gay men to live in small to medium cities and the suburbs. Some LGBTs living in big cities are considering a move to the suburbs.

What type of environment best describes the place in which you live?



You said that you live in an urban area / big city. **Do you have a desire to move out of the urban center to the suburbs or a rural community?**

	Gay / Bi Men	Lesbians / Bi
Yes	13%	16%
No	73%	63%
Not Sure	14%	21%

Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513; Urban Gay / Bi Men n=3,704 (40%); Urban Lesbians / Bi Women n=1,107 (32%)

Where LGBTs Live: Bisexual men and women are somewhat more likely to live in smaller communities than gay men and lesbians. The transgender community is more spread out in different size communities.

What type of environment best describes the place in which you live?

Identity Comparisons

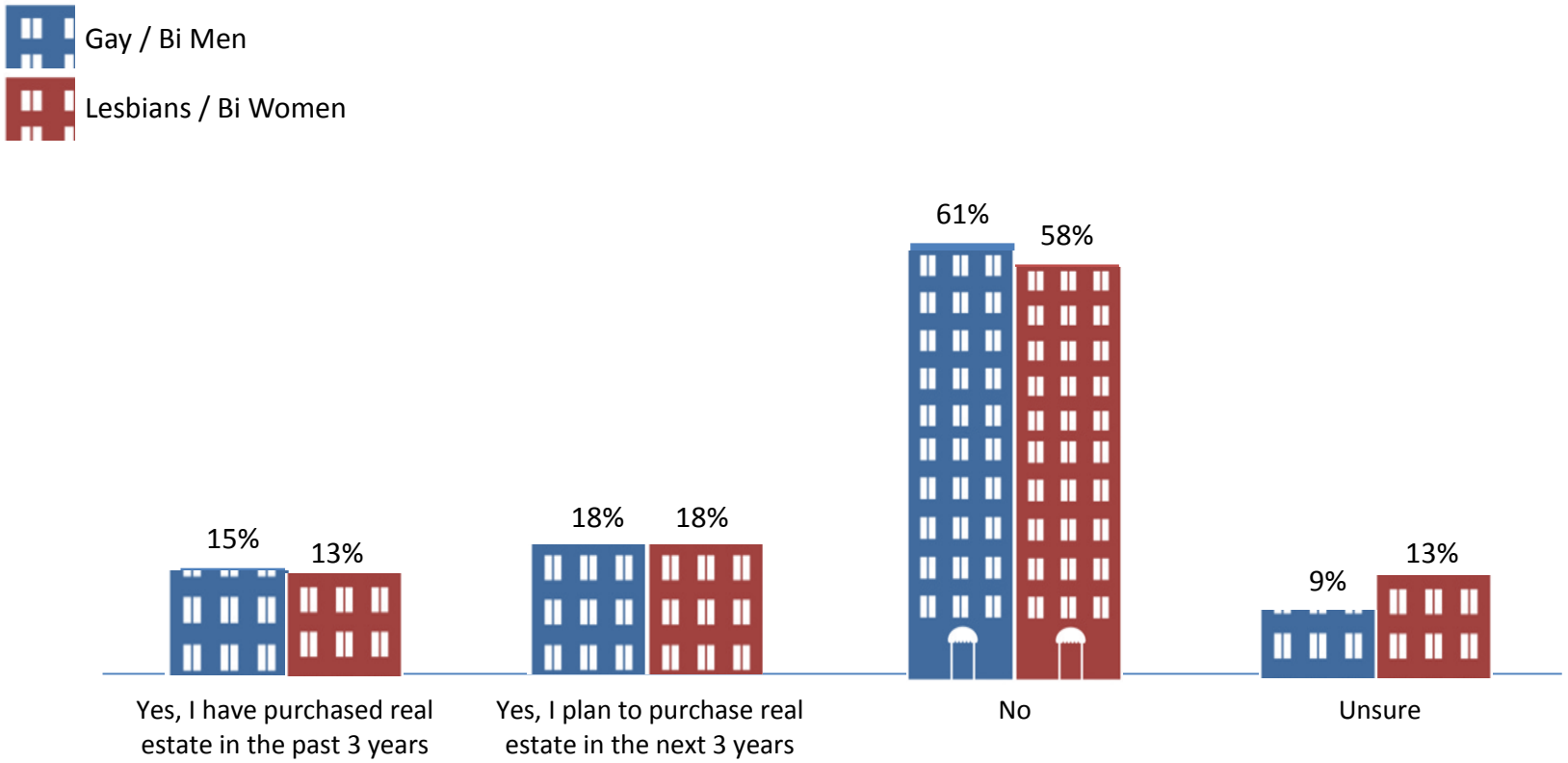
Respondents were able to select multiple identities.

	Lesbian or Gay Woman	Gay Man	Bisexual Woman	Bisexual Man	Transgender	Queer
Urban / big city	31%	41%	32%	22%	30%	37%
Medium sized city	26%	23%	26%	22%	22%	25%
Small city / small town	15%	12%	14%	19%	17%	16%
Suburb	20%	17%	21%	23%	18%	16%
Rural area	7%	5%	6%	12%	11%	5%
Resort community	1%	2%	1%	2%	1%	1%

Bases: Gay Men n=8,594; Bisexual Men n=985; Bisexual Women n=881; Lesbians n=2,880; Queer n=1,434; Transgender n=449

Buying Houses: About a third of gay men and lesbians are active in the real estate market, having purchased homes in the past three years and/or planning to purchase in the next three years.

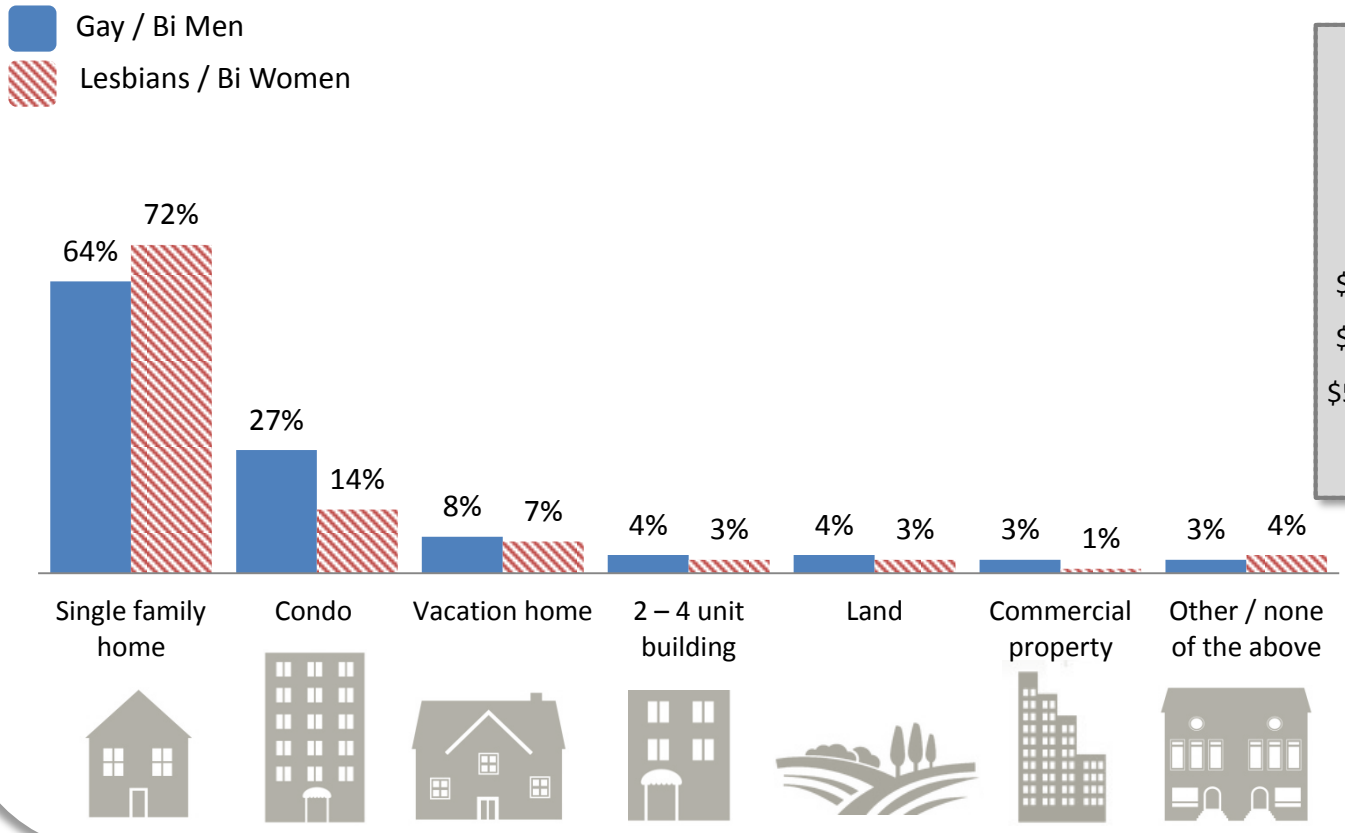
Have you purchased a home or real estate of **any kind** in the past three years, or do you plan to purchase a home or real estate of any kind in the next three years?



Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513

Real Estate Purchases: Those purchasing real estate were most likely to purchase single family homes. Gay men were more likely than lesbians to buy condos, reflective of being more likely to live in big cities. Purchasing of vacation homes was very popular for both men and women.

What type of real estate **have you purchased** in the past three years? (*Mark all that apply*)



Price Ranges
For Last Primary Residence

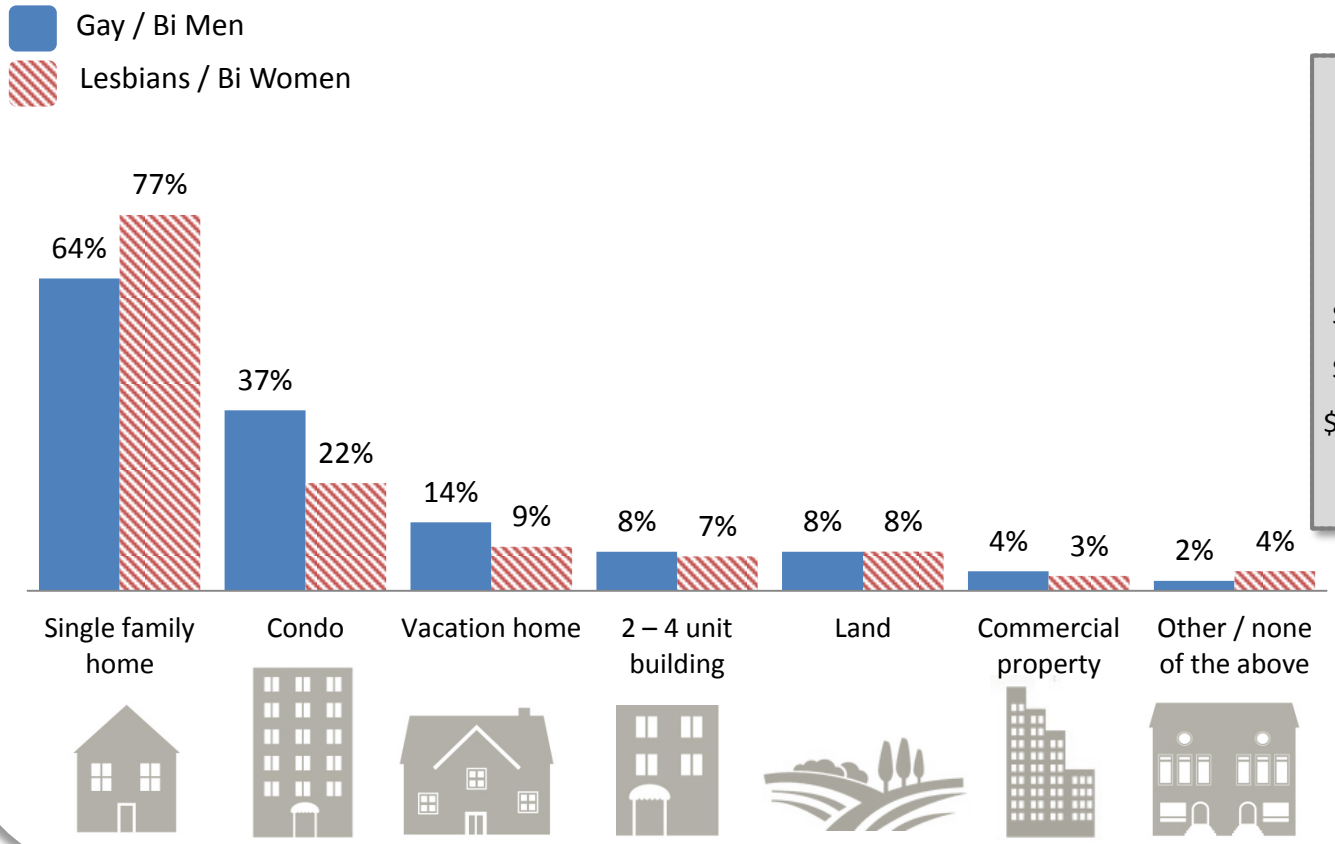
	*	**
Under $100K	18%	19%
$100K to $249K	35%	46%
$250K to $499K	29%	25%
$500K to $1mm	13%	9%
Over $1mm	5%	2%

**Among Gay / Bi Men;*
***Among Lesbians / Bi Women*

Bases: Gay and Bisexual Men n=1,429; Lesbians and Bisexual Women n=446

Future Real Estate Purchases: Similar trends play out for future purchases as past purchases.

What type of real estate **do you plan to purchase**? (*Mark all that apply*)



Price Ranges
For Future Purchases

	*	**
Under $100K	13%	20%
$100K to $249K	39%	47%
$250K to $499K	31%	26%
$500K to $1mm	14%	7%
Over $1mm	3%	1%

**Among Gay / Bi Men;*
***Among Lesbians / Bi Women*

Bases: Gay and Bisexual Men n=1,689; Lesbians and Bisexual Women n=617

Researching Real Estate: Over half of gay men and women are actively researching real estate, mostly online or through a real estate agent.

Which information sources have you used to research properties for sale or the real estate market? (Mark all that apply)

	Gay / Bi Men	Lesbians / Bi
Real estate websites	**44%**	**41%**
Search online (e.g. Google search)	**40%**	**41%**
Real estate agent	**31%**	**26%**
Talked with a friend or relative	**21%**	**24%**
Visited open houses	**19%**	**16%**
Local newspaper	**11%**	**10%**
Real estate publications	**8%**	**6%**
LGBT newspapers or directory	**7%**	**5%**
Visited builder models	**6%**	**4%**
Attended a seminar	**2%**	**2%**
I have not researched real estate.	41%	44%

Bases: Gay and Bisexual Men n=9,303; Lesbians and Bisexual Women n=3,482

Home Remodeling: Gay men are only slightly more likely than lesbians to pursue a major home remodel project.

LGBT Homeowners

Have you completed in the past 3 years, or plan to complete in the next 3 years, any of the following home remodel projects? *(Mark all that apply.)*

		Gay / Bi Men	Lesbians / Bi
Major landscaping of yard	Completed or Purchased in Past 3 Years	**20%**	**20%**
	Plan to Complete or Purchase in Next 3 Years	**19%**	**21%**
Full bathroom remodel	Completed or Purchased in Past 3 Years	**17%**	**15%**
	Plan to Complete or Purchase in Next 3 Years	**23%**	**22%**
Full kitchen remodel	Completed or Purchased in Past 3 Years	**15%**	**11%**
	Plan to Complete or Purchase in Next 3 Years	**20%**	**18%**
Major new furniture*	Completed or Purchased in Past 3 Years	**15%**	**11%**
	Plan to Complete or Purchase in Next 3 Years	**12%**	**12%**
Major new kitchen appliances*	Completed or Purchased in Past 3 Years	**13%**	**9%**
	Plan to Complete or Purchase in Next 3 Years	**11%**	**10%**
Master suite/bedroom remodel	Completed or Purchased in Past 3 Years	**10%**	**6%**
	Plan to Complete or Purchase in Next 3 Years	**10%**	**8%**

Bases: Gay and Bisexual Men n=5,011; Lesbians and Bisexual Women n=1,428

**$5,000.00 +*

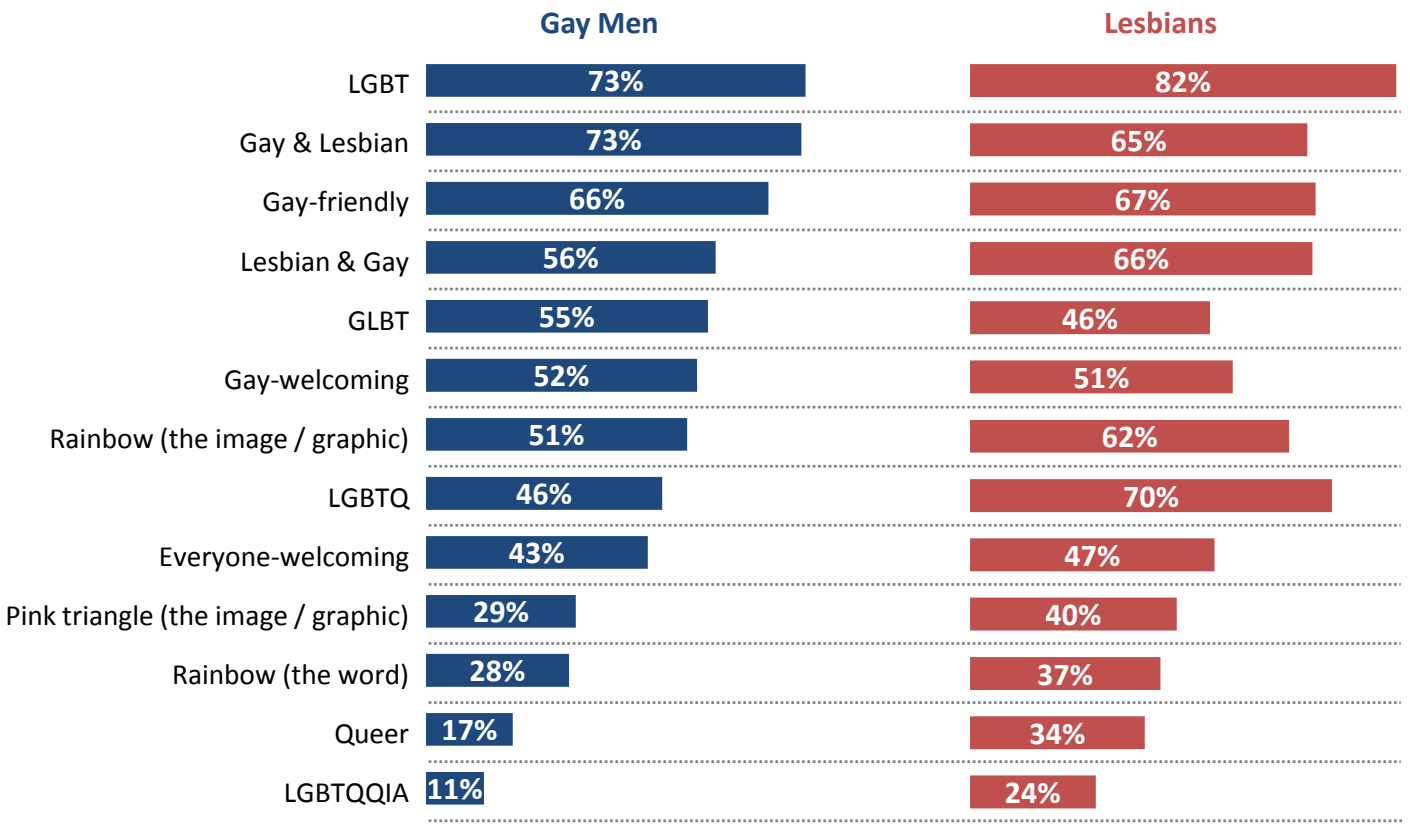
5

LGBT Terminology in Communications

Favorability to LGBT Terms: The rankings of preferred terms remains consistent compared to 2013.

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

% Positive

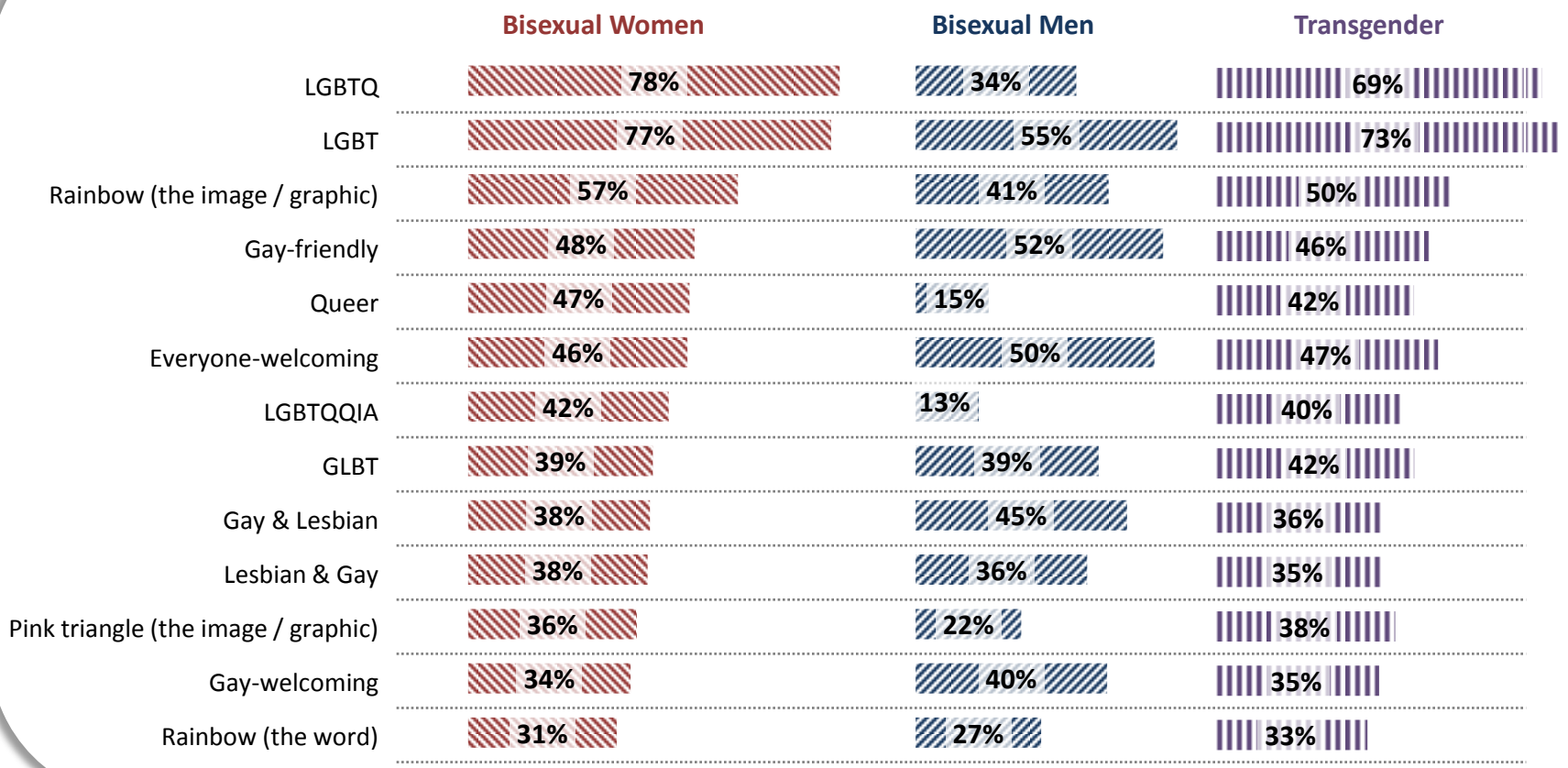


Bases: Gay Men n=8,579; Lesbians n=2,831

Favorability to LGBT Terms: Not surprisingly, bisexual men and women and transgender community members do not respond favorably to just "gay and lesbian." LGBT and LGBTQ are the preferred terms in the bisexual and transgender communities.

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

% Positive

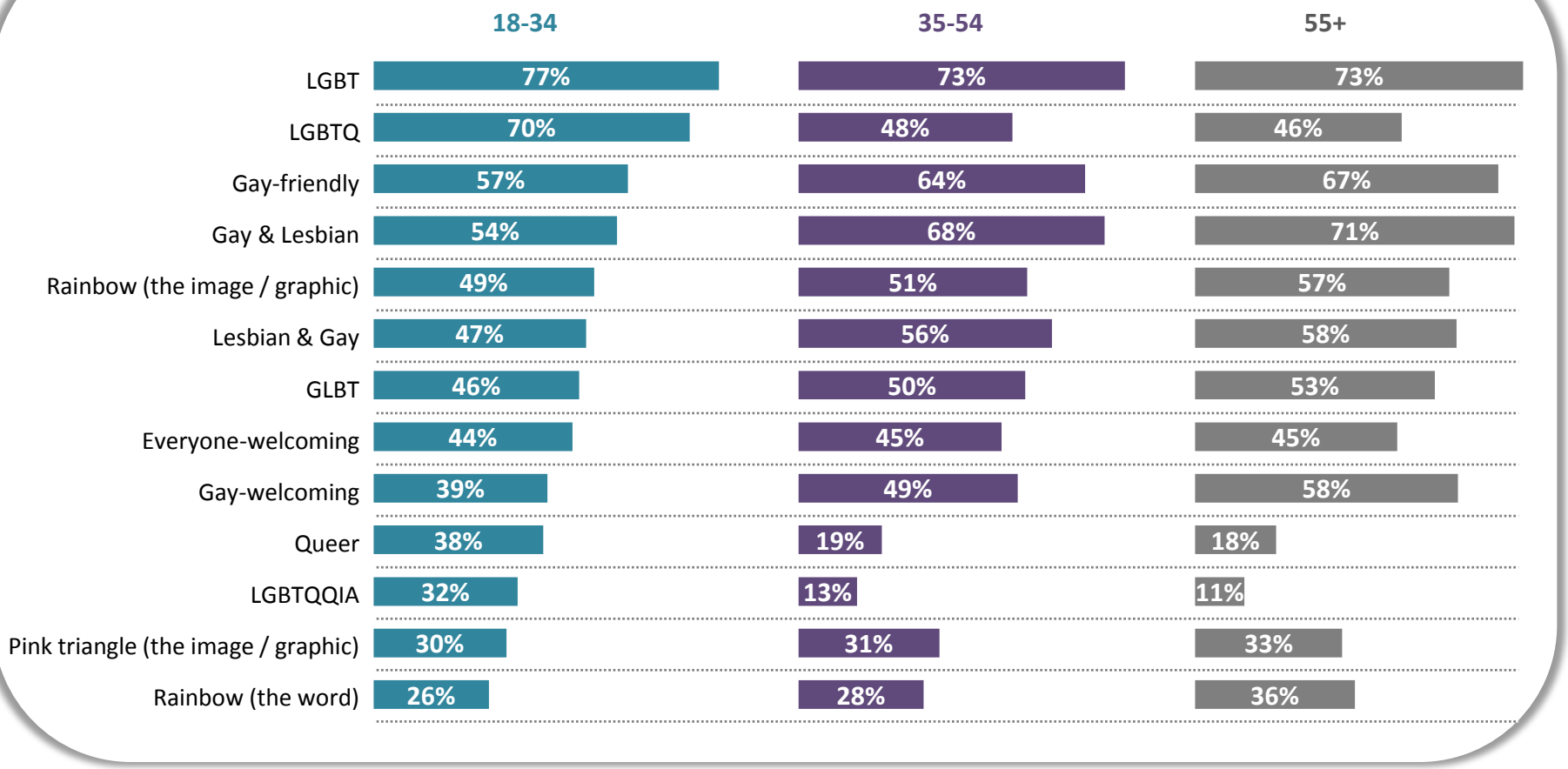


Bases: Bisexual Women n=856; Bisexual Men n=979; Transgender n=441

Favorability to LGBT Terms: While LGBT remains the preferred term for all age groups, LGBTQ is approaching equal in popularity to LGBT with age 18-35.

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

% Positive

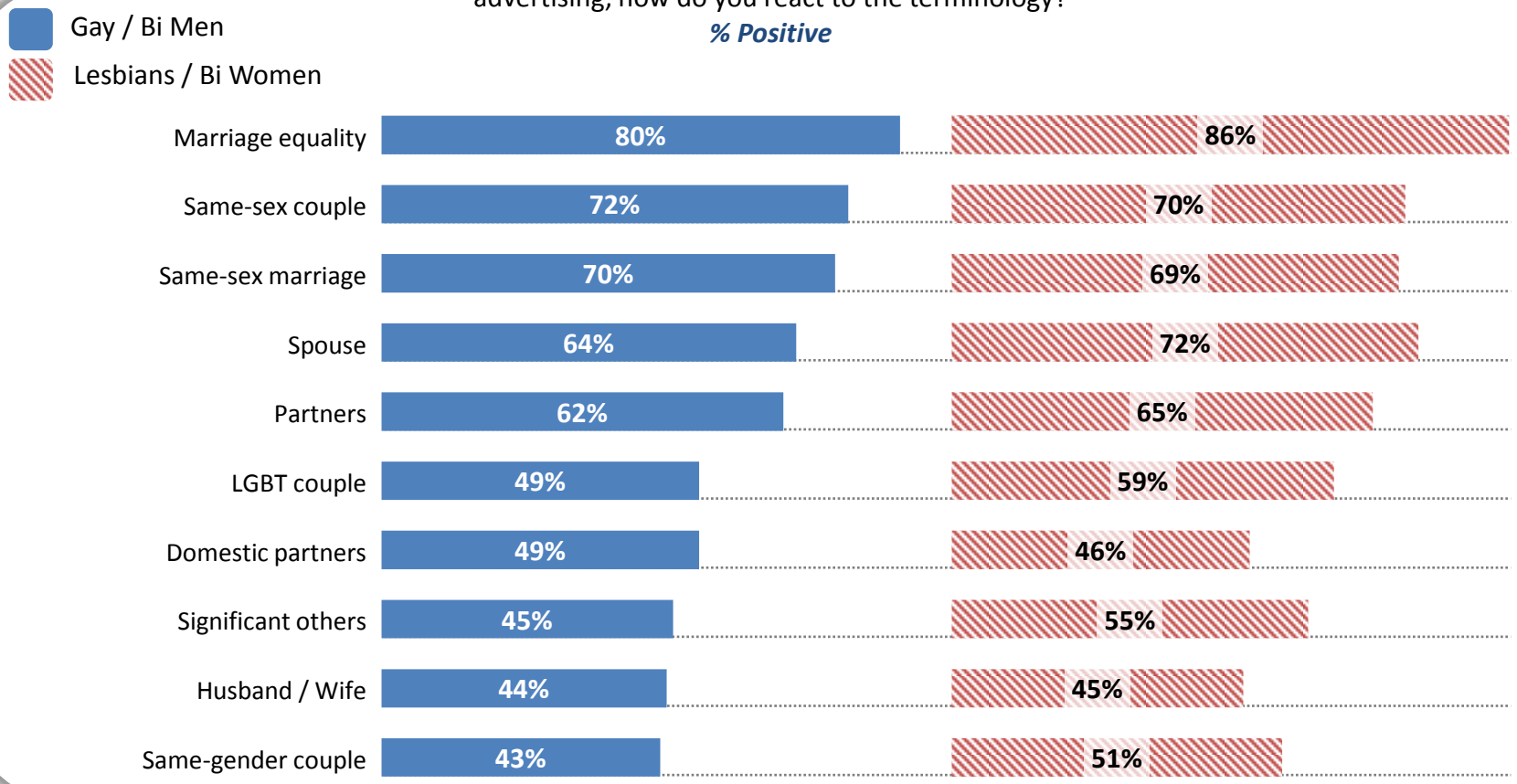


Bases: 18-34 n=3,407; 35-54 n=5,783; 55+ n=4,370

LGBT Relationship Terminology: Marriage Equality has risen to the most favorable term when speaking about LGBT relationships. Of note, there is still significant reluctance to use the words husband and wife. Partners and spouses are still preferred terms within relationships.

When you see the following terms to describe relationships in our community in the media or advertising, how do you react to the terminology?

% Positive



Bases: Gay and Bisexual Men n=9,211; Lesbians and Bisexual Women n=3,467

Terminology (Generation): Millennials are more likely the respond positively to the words husband and wife than older LGBTs.

Corporate Marketing Terms and Terminology Reactions
% Positive

	Millennials	Generation X	Baby Boomers	
LGBT	77%	73%	73%	*Identifying Terms*
LGBTQ	71%	50%	46%	
GLBT	45%	51%	52%	
Queer	39%	20%	17%	
Marriage equality	81%	81%	81%	*Relationship Terms*
Same-sex marriage	62%	68%	71%	
Partners	60%	63%	64%	
Husband / Wife	53%	48%	38%	
Domestic partners	34%	48%	54%	

Bases: Millennial Generation (1987-1981) n=3,148; Gen X (1980-1965) n=4,041; Baby Boomers (1964-1946) n=5,576

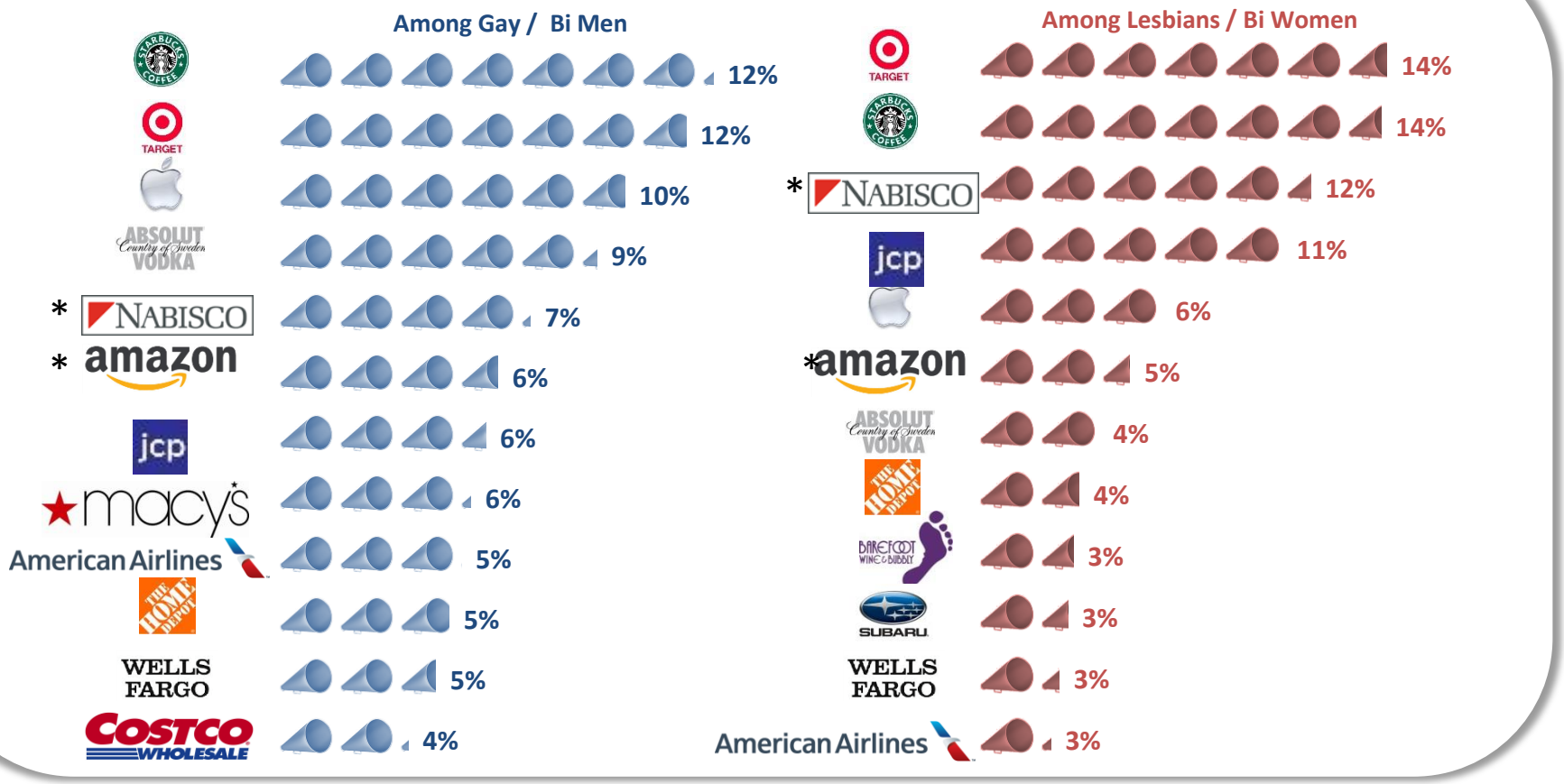
6

Brand Recognition

Corporate LGBT Outreach and Motivation to Purchase: Pro-LGBT corporate policies have encouraged the LGBT community to purchase many brands. As a write-in exercise, these are the top 12 brands indicated by participants, but the overall list was extensive.

Over the past 12 months, which companies or brands have you made a conscious decision to purchase from because of their **pro-LGBT policies or practices**? *Write up to 3. (if none, leave blank)*

Top 12



Bases: Gay and Bisexual Men n=2,624; Lesbians and Bisexual Women n=1,018

**Nabisco includes Oreo and Honey Maid. Amazon includes Kindle.*

LGBT Imagery in Mainstream Media:

As another write-in question, these brands were top-of-mind to the LGBT community over the past year for their LGBT advertising and outreach efforts. Of note, many brands have "staying power" in the minds of LGBT people as their actual major outreach effort was more than 12 months ago.

In the past 12 months, which major corporations have you noticed including **LGBT imagery or messages in their general market advertising or communications**, such as in mainstream media, TV, etc.? (List up to five corporations)

Top 12

Gay / Bi Men

* Nabisco	20%
jcp	17%
Wells Fargo	12%
Coca-Cola	10%
Target	8%
Budweiser	7%
Allstate	7%
Subaru	7%
Absolut Vodka	6%
amazon	6%
American Airlines	6%
IKEA	6%

Lesbians / Bi Women

28%	jcp
27% *	Nabisco
13%	Coca-Cola
12% *	General Mills
11%	Target
10%	Subaru
6%	Wells Fargo
6% *	amazon
6%	Chevrolet
5%	Google
5%	Starbucks
5% *	Gap

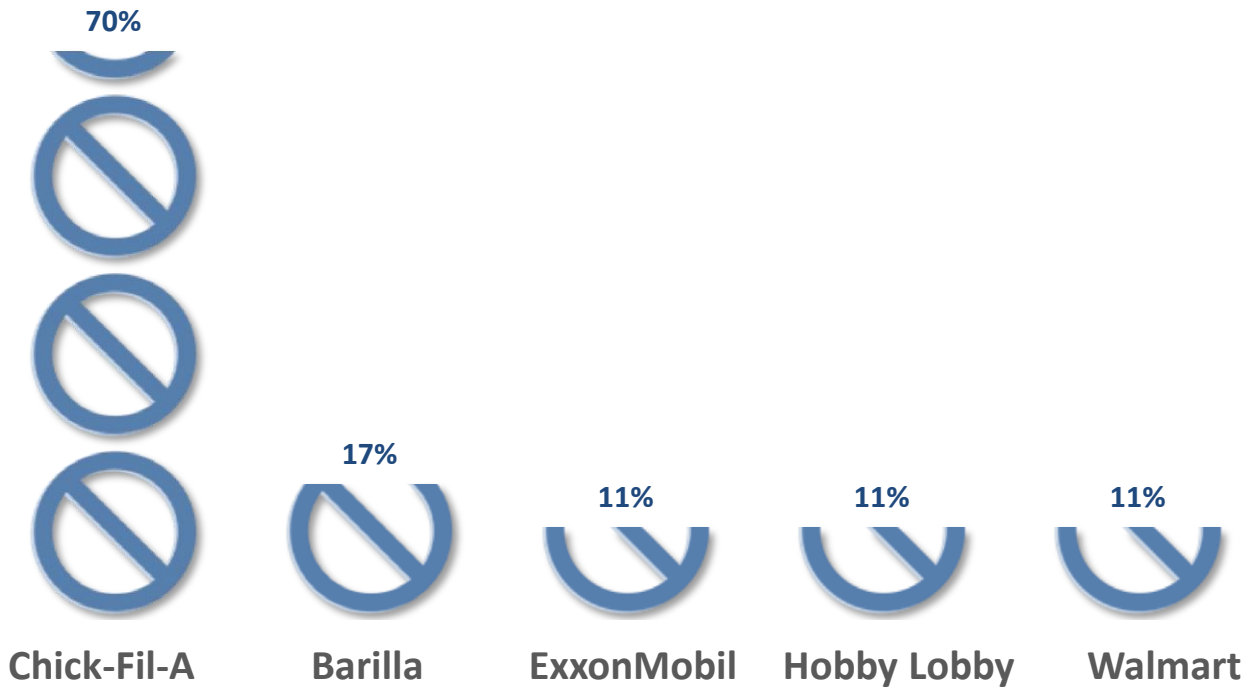
Bases: Gay and Bisexual Men n=4,110; Lesbians and Bisexual Women n=1,670

**Nabisco includes Oreo and Honey Maid. General Mills includes Cheerios. Gap includes Gap, Old Navy and Banana Republic. Amazon includes Kindle.*

Negative Brand Recognition:

Once again, Chick-Fil-A by far has the most negative reputation within the LGBT community. 70% of LGBTs typed in the company name as the one brand they are boycotting. New to the list, Barilla and Hobby Lobby had recent negative publicity within LGBT community.

Over the past 12 months, which companies or brands have you boycotted because of their **anti-LGBT policies or practices**?
Write up to 3. (if none, leave blank)
Among Gay / Bi Men and Lesbians / Bi Women

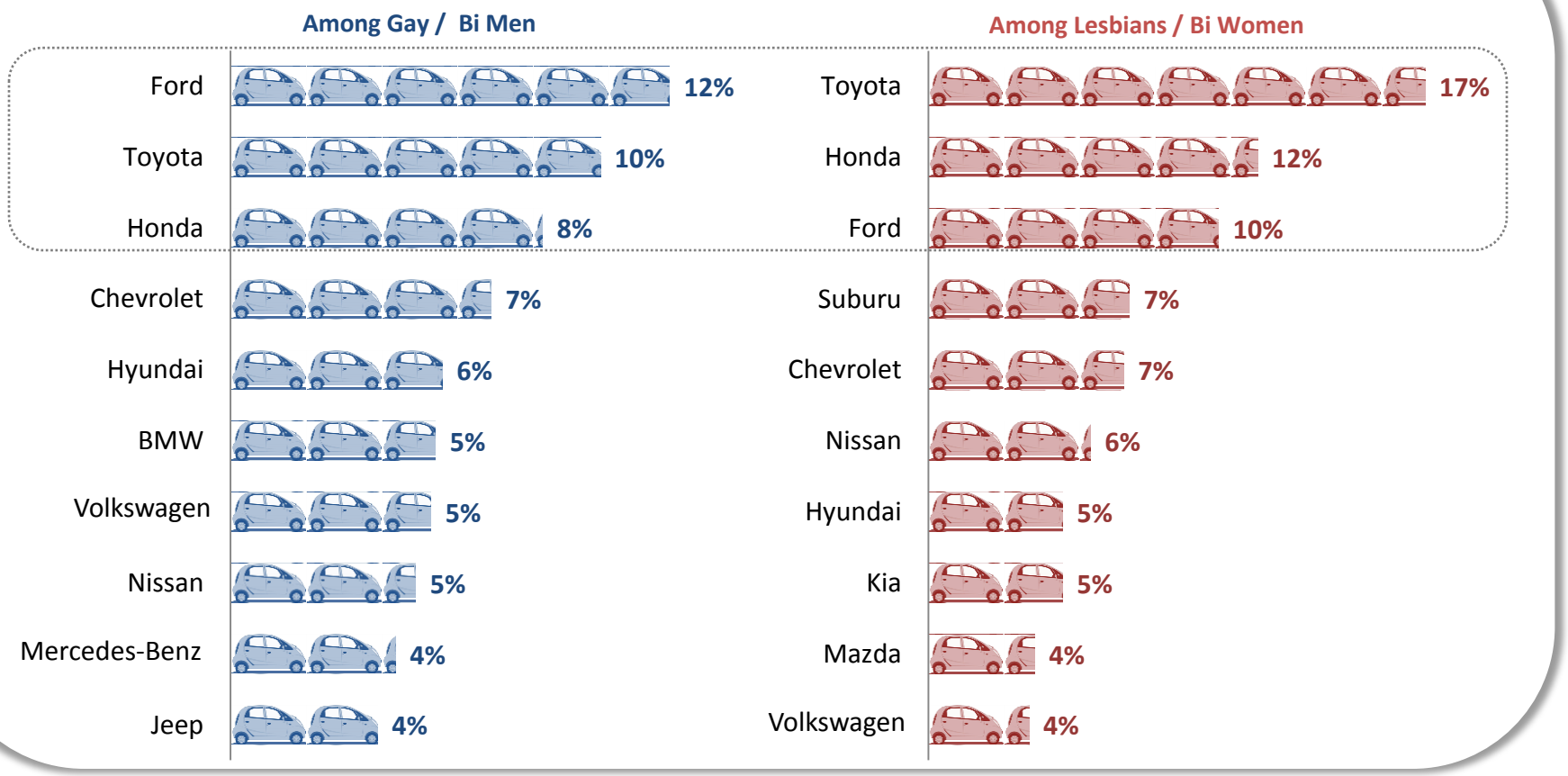


Bases: Gay and Bisexual Men and Lesbians and Bisexual Women n=6,658

Automotive Purchases: One brand does not dominate LGBT automobile purchasing. Ford, Honda and Toyota are the top three brands in the LGBT community.

Please let us know about your purchases over the past year, and planned purchases over the coming year. (If an item does not apply, skip to the next line.)

Automobile Leases and Purchases



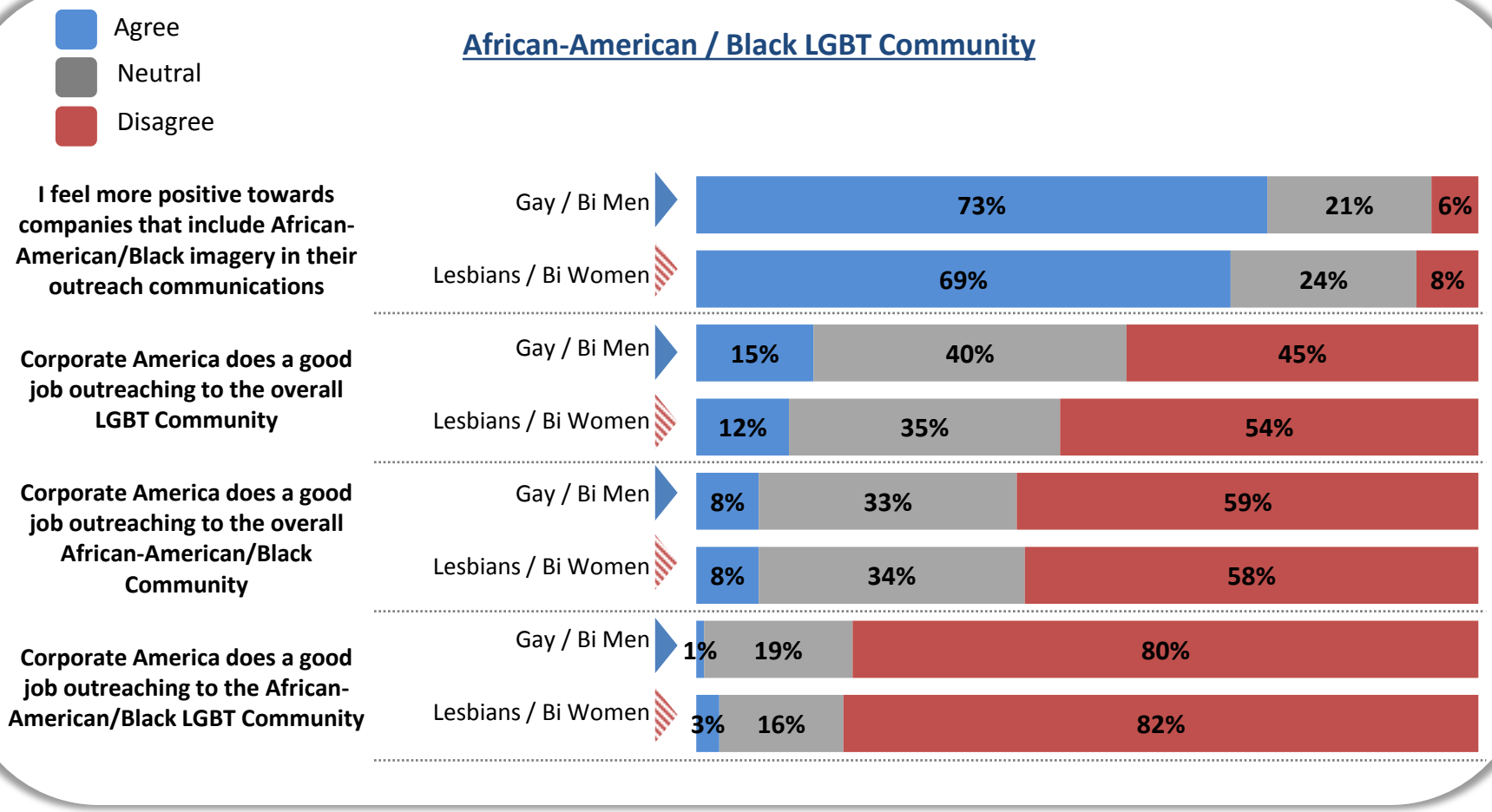
Bases: Gay and Bisexual Men n=1,698 Lesbians and Bisexual Women n=509

Multicultural Corporate Outreach:

Similar trends can be found for the African-American, Asian-American and Latino LGBT communities. Each community feels more positively towards companies that outreach to their communities, but all feel corporate America does not do a good job in their outreach.

Do you agree or disagree with these statements?

African-American / Black LGBT Community



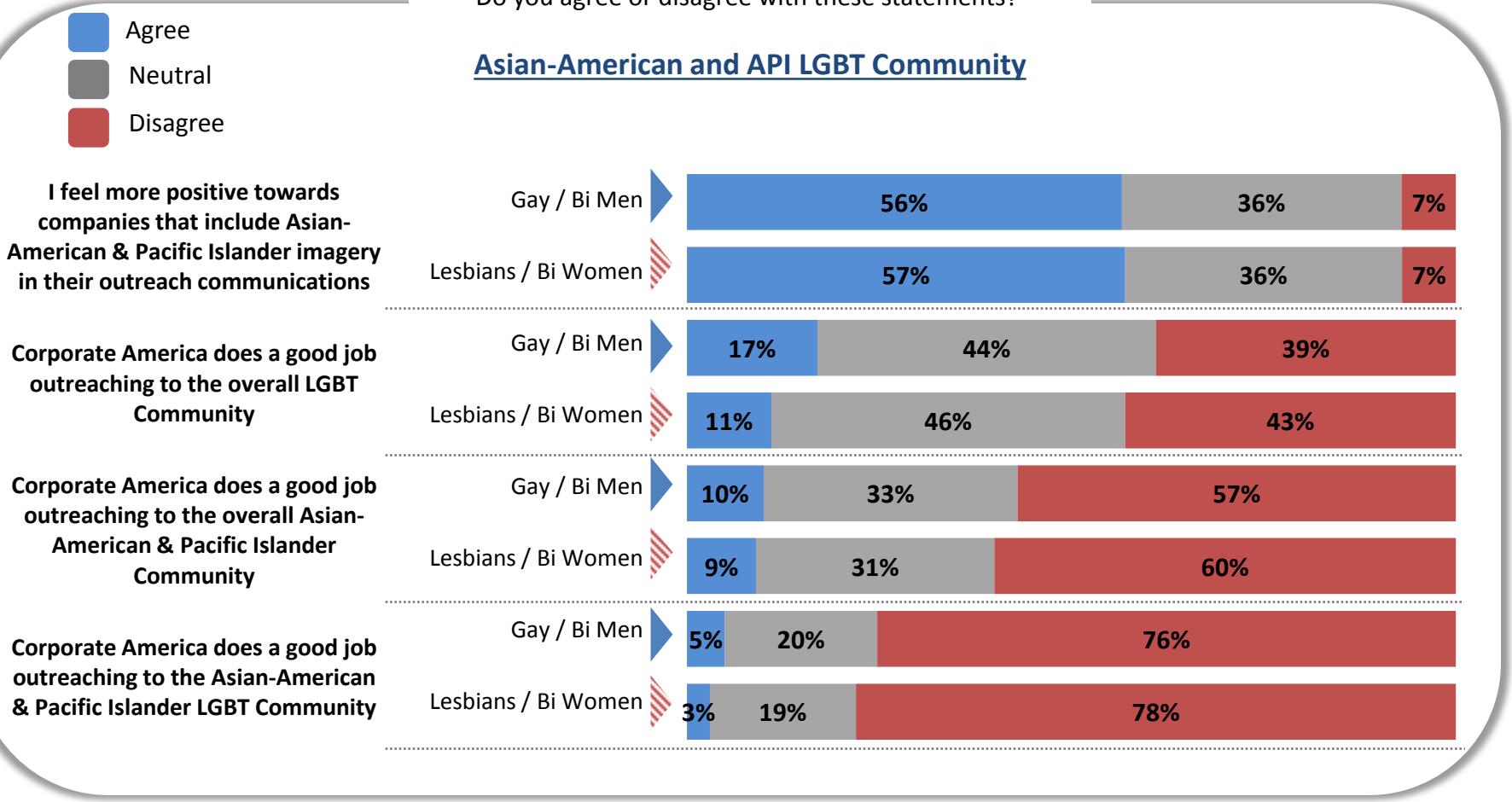
Bases: Gay and Bisexual African American and Black Men n=346; Lesbians and Bisexual African American and Black Women n=247

Multicultural Corporate Outreach:

Similar trends can be found for the African-American, Asian-American and Latino LGBT communities. Each community feels more positively towards companies that outreach to their communities, but feel corporate America does not do a good job outreaching to their communities.

Do you agree or disagree with these statements?

Asian-American and API LGBT Community



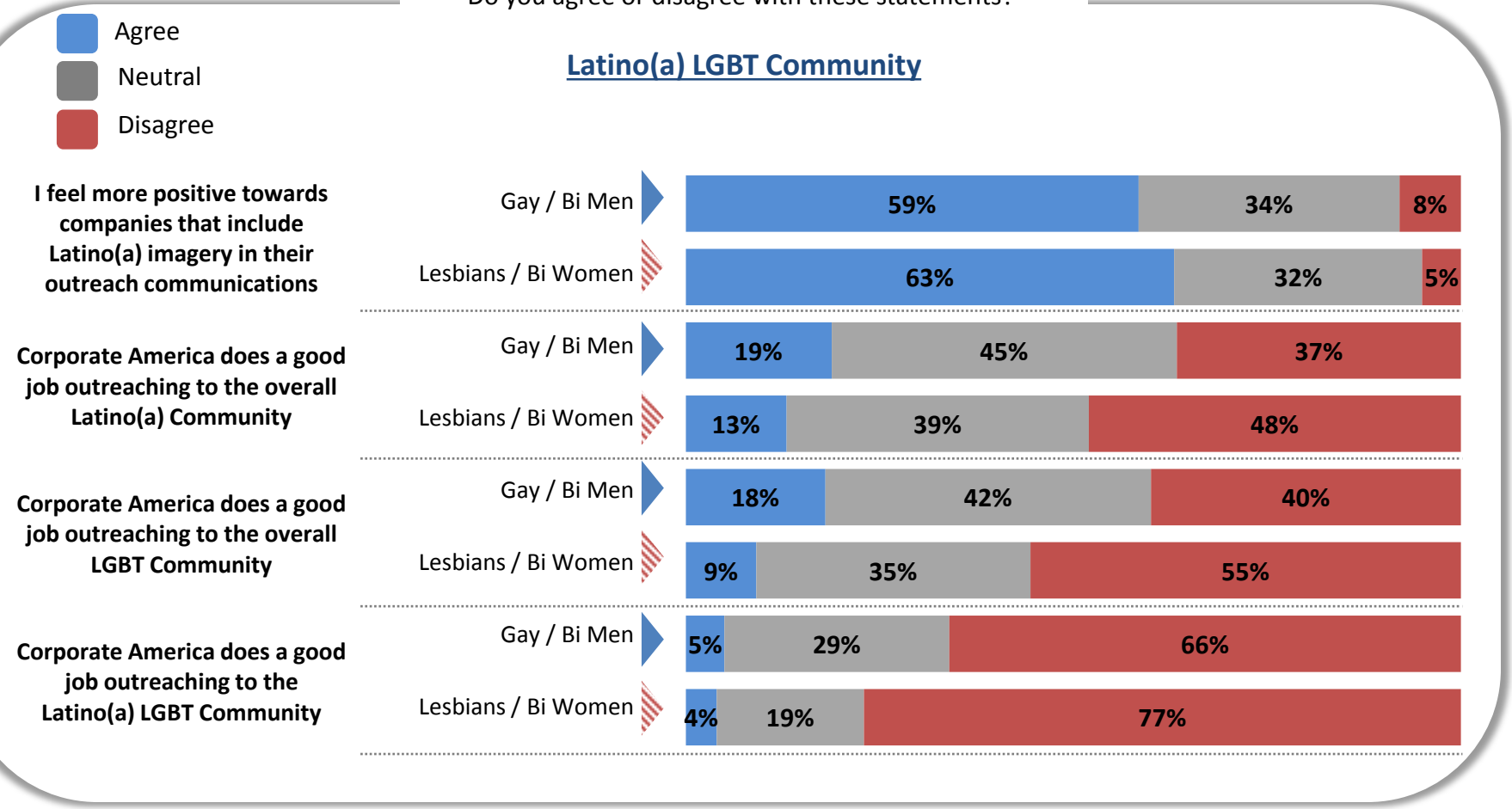
Bases: Gay and Bisexual Asian American and API Men n=177; Lesbians and Bisexual Asian American and API Women n=70

Multicultural Corporate Outreach:

Similar trends can be found for the African-American, Asian-American and Latino LGBT communities. Each community feels more positively towards companies that outreach to their communities, but feel corporate America does not do a good job outreaching to their communities.

Do you agree or disagree with these statements?

Latino(a) LGBT Community



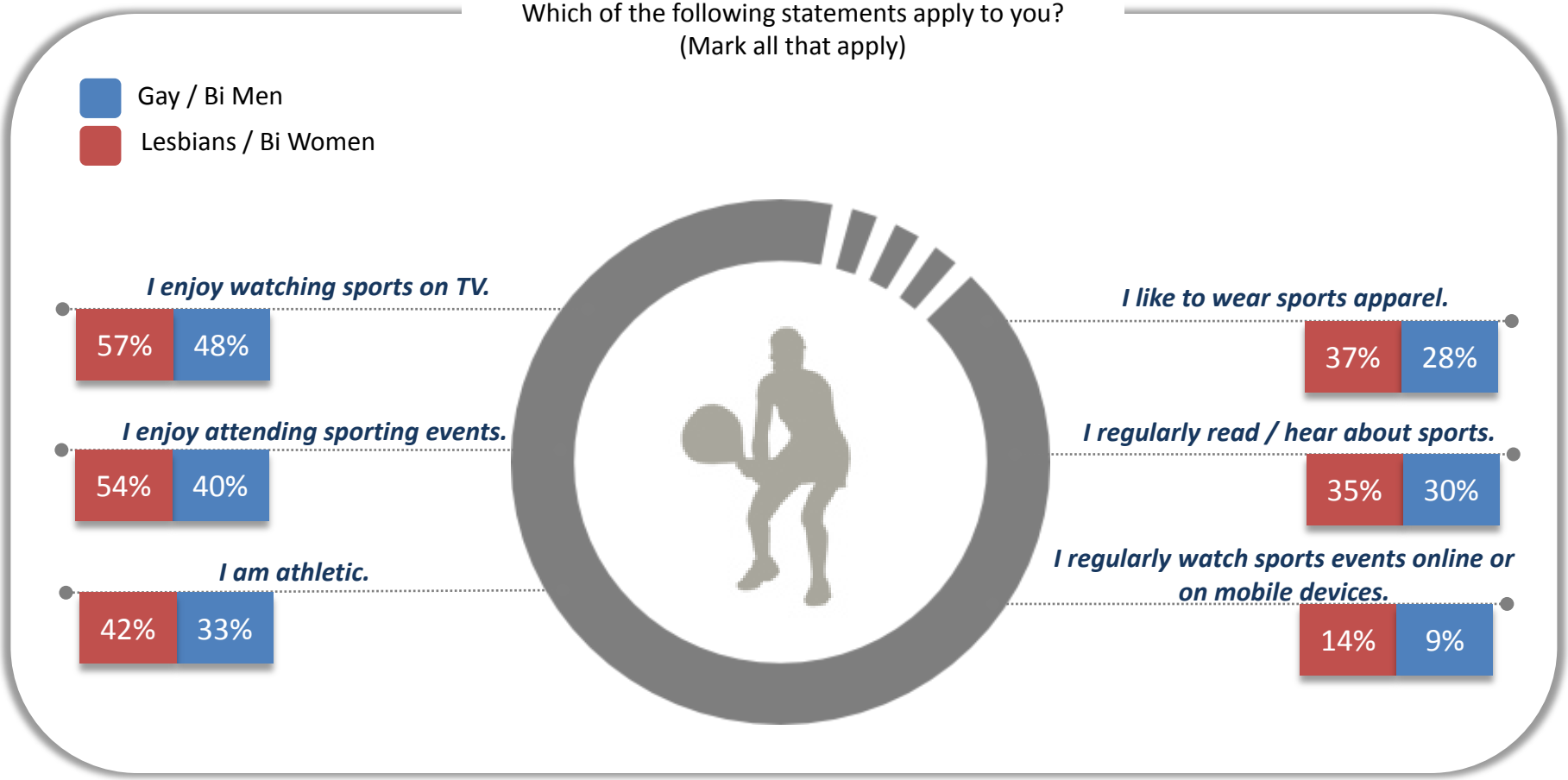
Bases: Gay and Bisexual Latino Men n=634; Lesbians and Bisexual Latina Women n=206

7

Sports Interaction and Engagement

LGBT Sports Interest: Lesbians are somewhat more likely than gay men to describe themselves as interested in sports, or to describe themselves as athletic.

Which of the following statements apply to you?
(Mark all that apply)

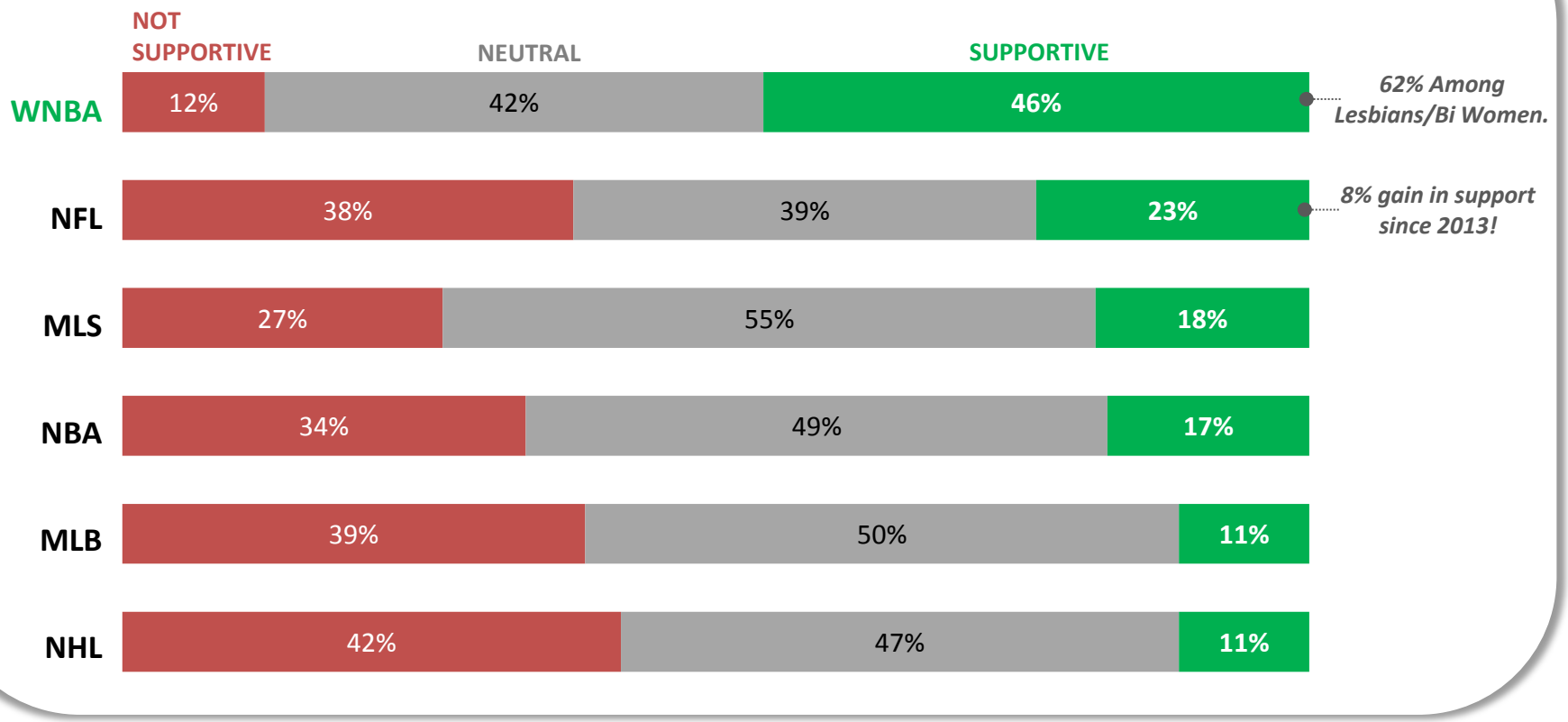


Bases: Gay and Bisexual Men n=7,773; Lesbians and Bisexual Women n=2,961

LGBT Sports League Perceptions: The WNBA earns the highest ratings as being supportive of the LGBT community (driven by lesbian/bi women). Of note, the NFL has an 8% positive gain since 2013.

How supportive are these leagues to the LGBT community?

Among Total LGBT
(no major differences across groups)



Bases: All LGBT n=10,589

8

Family Dynamics

Identity Descriptors: Overall, gay men and lesbians are likely to use similar words to describe themselves.

If you had to describe yourself or your personality in three words, which words would you use? Please only use single words, no phrases.

Gay / Bi Men

Friendly	12%
Outgoing	11%
Caring	10%
Funny	10%
Intelligent	9%
Loyal	9%
Honest	8%
Fun	8%
Smart	8%
Loving	6%

Lesbians / Bi

Funny	13%
Intelligent	12%
Loyal	11%
Caring	9%
Smart	8%
Creative	8%
Kind	8%
Friendly	7%
Outgoing	7%
Loving	7%

Bases: Gay and Bisexual Men n=8,932; Lesbians and Bisexual Women n=3,361

LGBT Baby Boom: More and more same-sex couples are having children. However, the concentration is especially high among lesbians age 30-44.

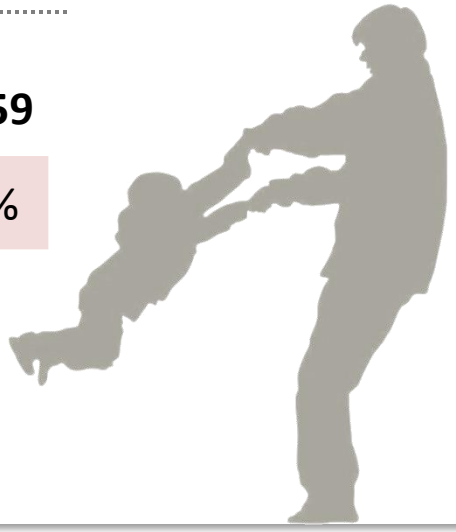
Do you have children under the age of 18?

Gay / Bi Men

	18-29	30-44	45-59
Yes	1%	8%	7%

Lesbians / Bi Women

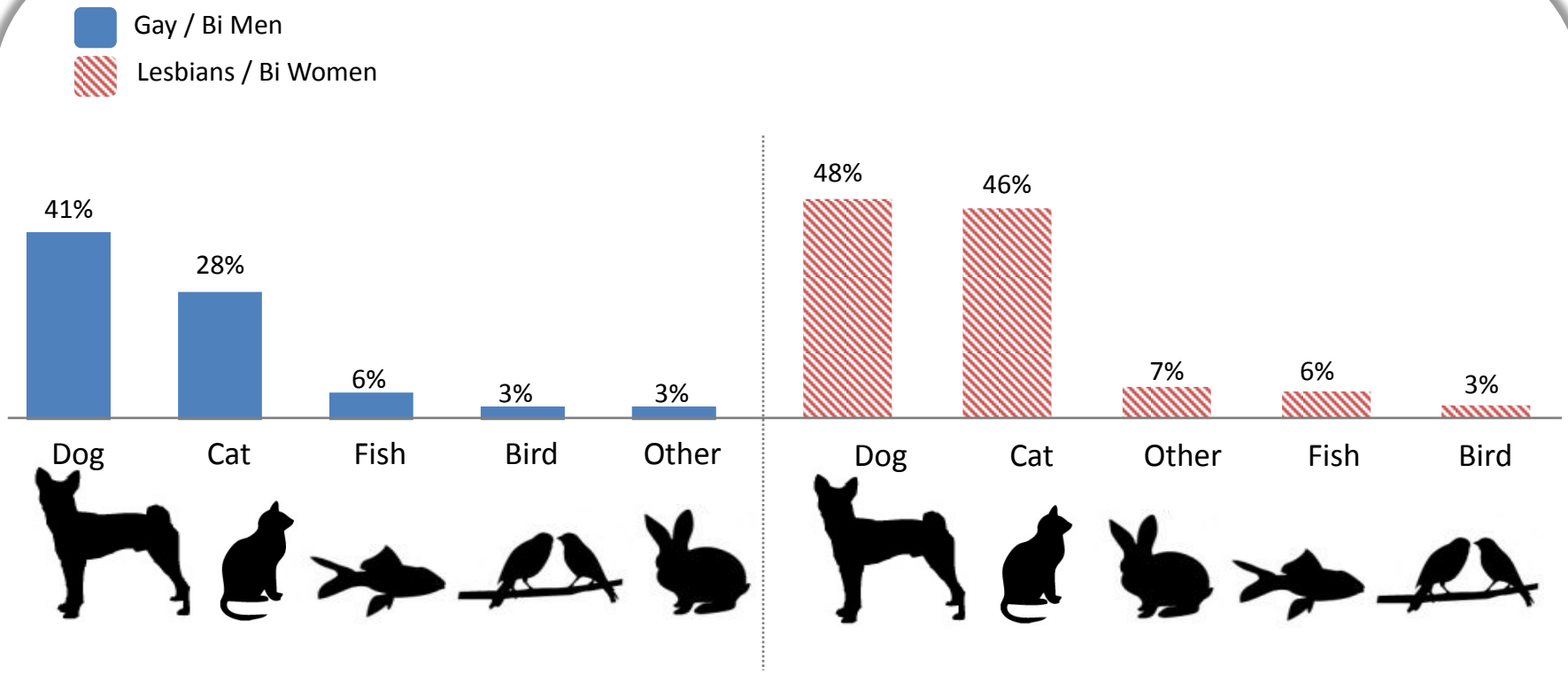
	18-29	30-44	45-59
Yes	3%	27%	15%



Bases: Lesbians /Bi Women: 18-29 n=1,030; 30-44 n=1,029; 45-59 n=4,941; Gay / Bi Men: 18-29 n=973; 30-44 n=2,208; 45-59 n=4,037

Pet Companionship: Lesbians are more likely than gay men to care for pets, especially cats.

What kind(s) of pet(s) do you care for in your home, if any?
(Mark all that apply.)



38% of Gay and Bisexual Men do not have pets.

24% of Lesbians and Bisexual Women do not have pets.

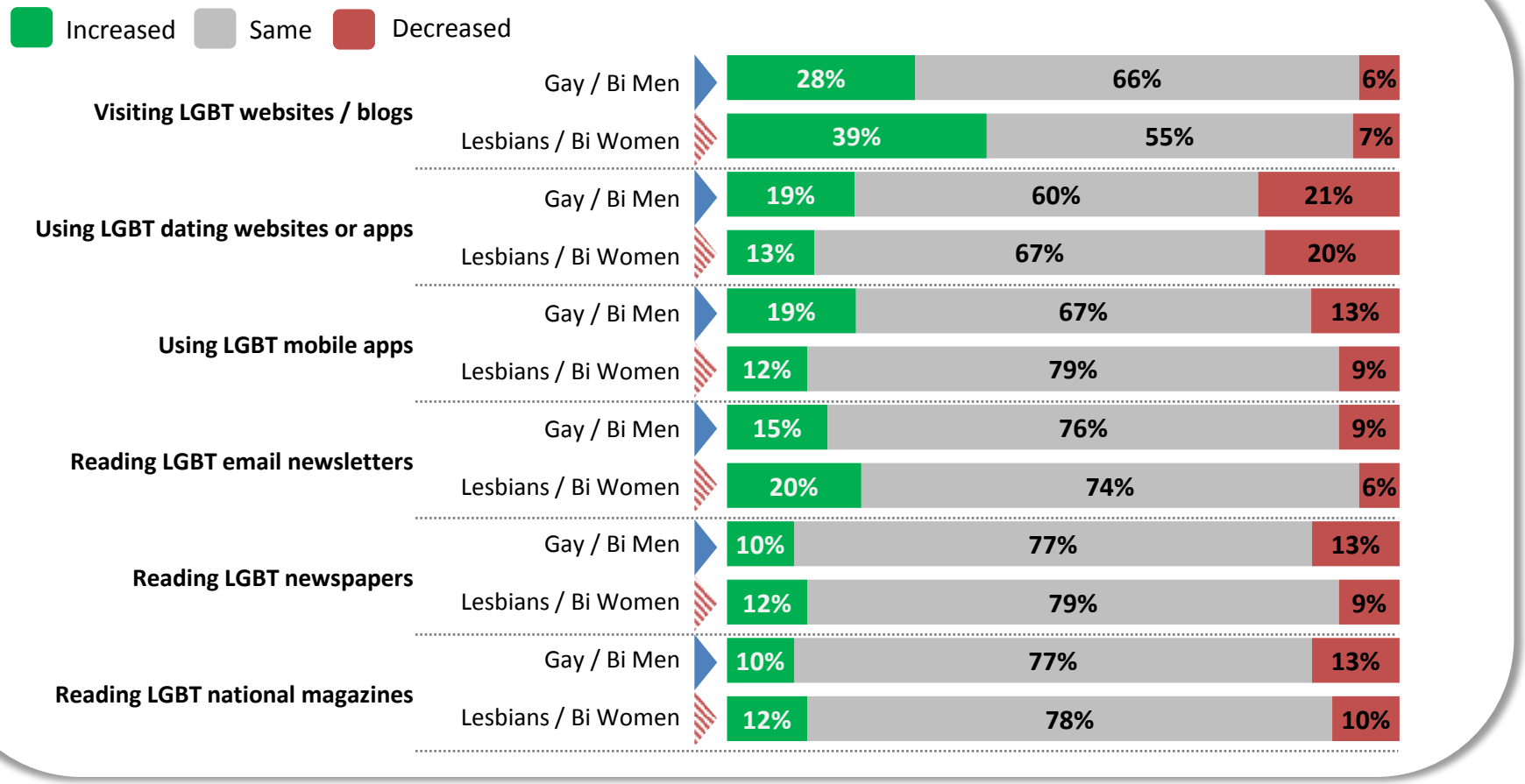
Bases: Gay and Bisexual Men n=9,211; Lesbians and Bisexual Women n=3,467

9

Media Trends and Interaction

Media Consumption Changes: Engagement with LGBT media is generally stable, with digital media experiencing significant growth and print media staying the same in readership.

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



Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513

Media Consumption Changes by Generation: Millennials are voracious media consumers, and they are significantly increasing their media consumption in all categories.

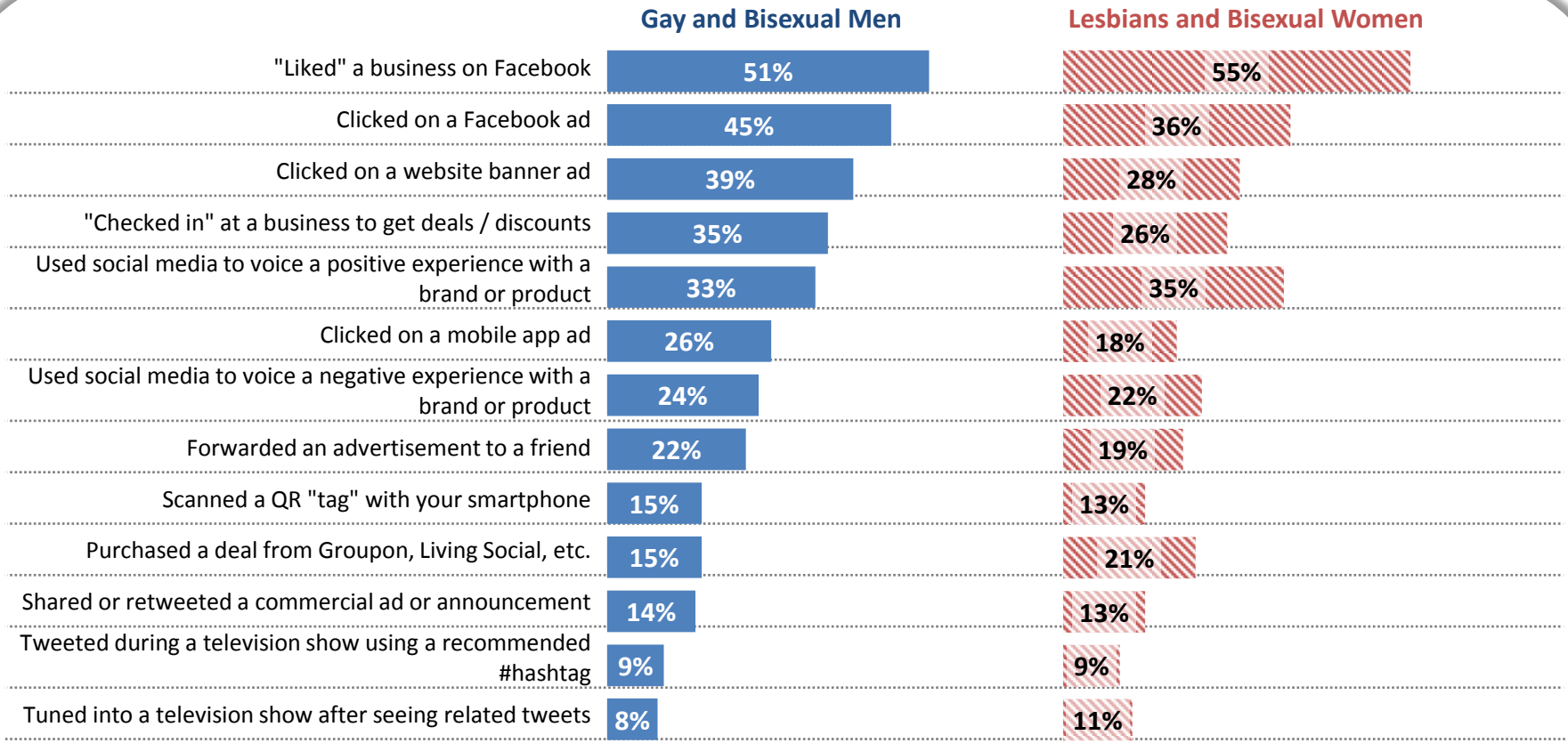
Has your interaction with LGBT media (newspapers, websites, etc.) changed over the past 12 months?

		Millennials	Generation X	Baby Boomers
Reading LGBT newspapers	*Increased*	15%	11%	9%
	Same	77%	75%	78%
	Decreased	8%	14%	12%
Reading LGBT national magazines	*Increased*	15%	11%	9%
	Same	77%	75%	78%
	Decreased	8%	14%	12%
Visiting LGBT websites / blogs	*Increased*	49%	31%	24%
	Same	45%	63%	70%
	Decreased	6%	7%	6%
Reading LGBT email newsletters	*Increased*	22%	16%	15%
	Same	71%	75%	77%
	Decreased	7%	9%	8%
Using LGBT mobile apps	*Increased*	24%	19%	13%
	Same	66%	69%	74%
	Decreased	10%	12%	13%
Using LGBT dating websites or apps	*Increased*	24%	18%	14%
	Same	55%	60%	67%
	Decreased	21%	22%	19%

Bases: Millennial Generation (1987-1981) n=3,148; Gen X (1980-1965) n=4,041; Baby Boomers (1964-1946) n=5,576

Interaction with Advertising: Engagement with Facebook (both business pages and ads) continues to be very strong among LGBTs, after overtaking traditional banner ads last year.

In the past 7 days have you...? (*Mark all that apply.*)



Bases: Gay and Bisexual Men n=9,376; Lesbians and Bisexual Women n=3,513

Social Media Involvement: LGBTs, especially those 35-44 are very engaged with Facebook.

About a third of LGBTs are engaged in social media marketing options beyond Facebook. Strong engagement with social media is common for LGBTs of all ages.

In the past 7 days have you...? (*Mark all that apply.*)

	LGBTs 18-34	LGBTs 35-44	LGBTs 45-64
"Liked" a business on Facebook	57%	62%	50%
Used social media to voice a positive experience with a brand or product	41%	39%	31%
Clicked on a Facebook ad	40%	43%	43%
Clicked on a website banner ad	36%	32%	37%
Used social media to voice a negative experience with a brand or product	30%	28%	21%
Clicked on a mobile app ad	25%	26%	23%
"Checked in" at a business to get deals / discounts	24%	32%	34%
Forwarded an advertisement to a friend	22%	23%	20%
Shared or retweeted a commercial ad or announcement	19%	17%	12%
Purchased a deal from Groupon, Living Social, etc.	18%	20%	15%
Tweeted during a television show using a recommended #hashtag	16%	12%	5%
Tuned into a television show after seeing related tweets	15%	11%	6%
Scanned a QR "tag" with your smartphone	13%	19%	14%

Bases: All LGBT: 18-34 n=2,691; 35-44 n=1,816; 45-64 n=4,941

Media Engagement: LGBTs are engaged with websites and blogs dedicated to the LGBT community, especially those under age 35. Older LGBT are far more engaged with the LGBT print media than younger LGBTs. Streaming video has become very popular with young LGBTs.

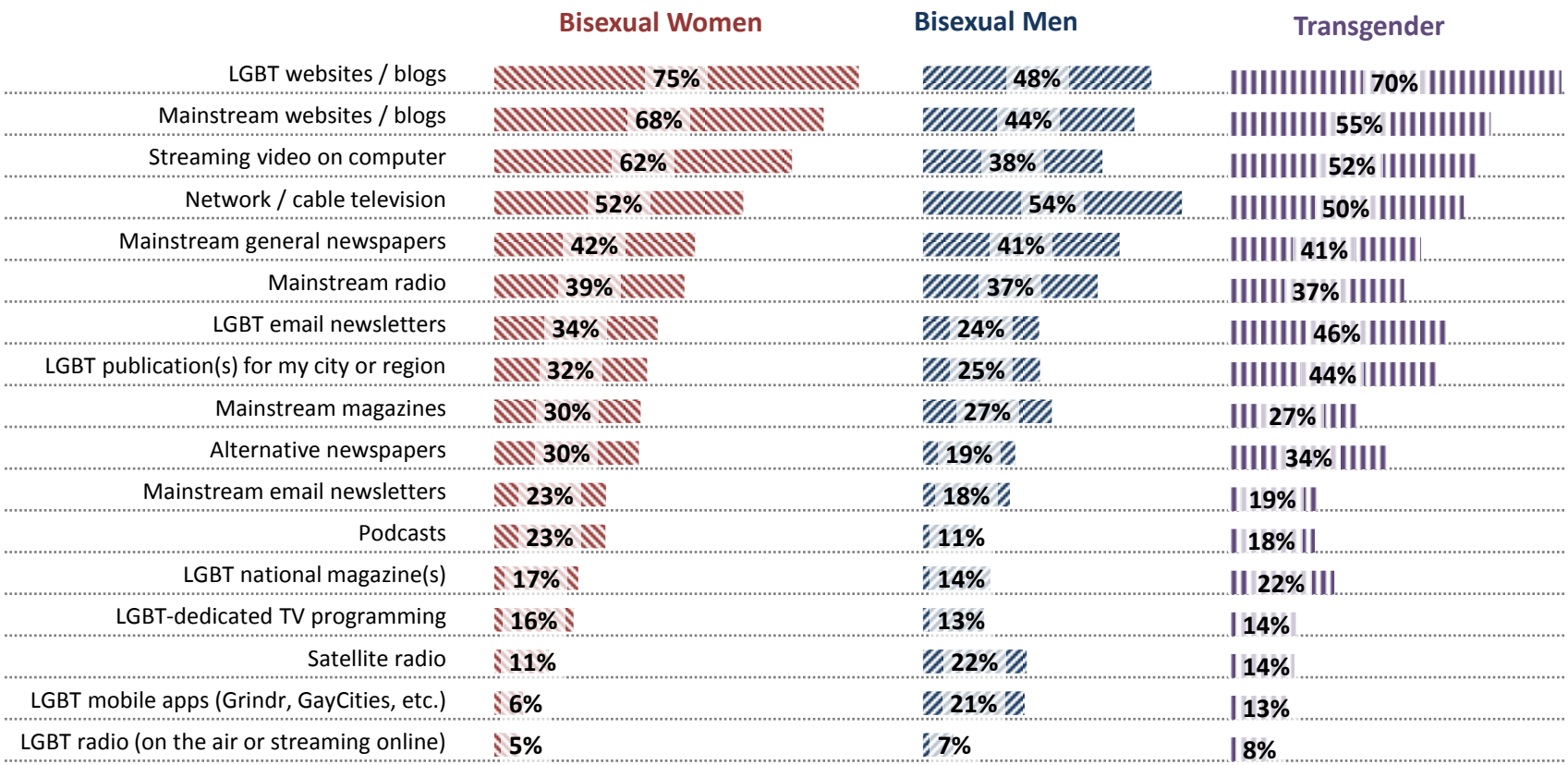
In the past 7 days, have you read, viewed, or listened to...? *(Please select all that apply.)*

	LGBTs 18-34	LGBTs 35-44	LGBTs 45-64
LGBT websites / blogs	74%	63%	56%
Streaming video (TV or movies) on your computer	64%	50%	35%
Mainstream websites / blogs	62%	57%	51%
Network / cable television	50%	60%	64%
Mainstream radio	41%	42%	40%
Mainstream general newspapers	38%	43%	51%
LGBT publication(s) for my city or region	36%	45%	45%
LGBT email newsletters	35%	38%	38%
Mainstream magazines	28%	38%	39%
LGBT mobile apps (Grindr, GayCities, etc.)	27%	29%	19%
LGBT-dedicated TV programming (i.e. on Logo and/or other networks)	25%	25%	20%
Alternative newspapers	23%	24%	26%
LGBT national magazine(s)	22%	32%	32%
Mainstream email newsletters	21%	23%	23%
Podcasts	21%	16%	10%
Satellite radio	13%	24%	24%
LGBT radio (on the air or streaming online)	7%	11%	10%
None of the above	3%	3%	4%

Bases: All LGBT: 18-34 n=3,371; 35-44 n=2,244; 45-64 n=6,403

Media Engagement: The transgender community and bisexual women seems especially engaged with the LGBT media.

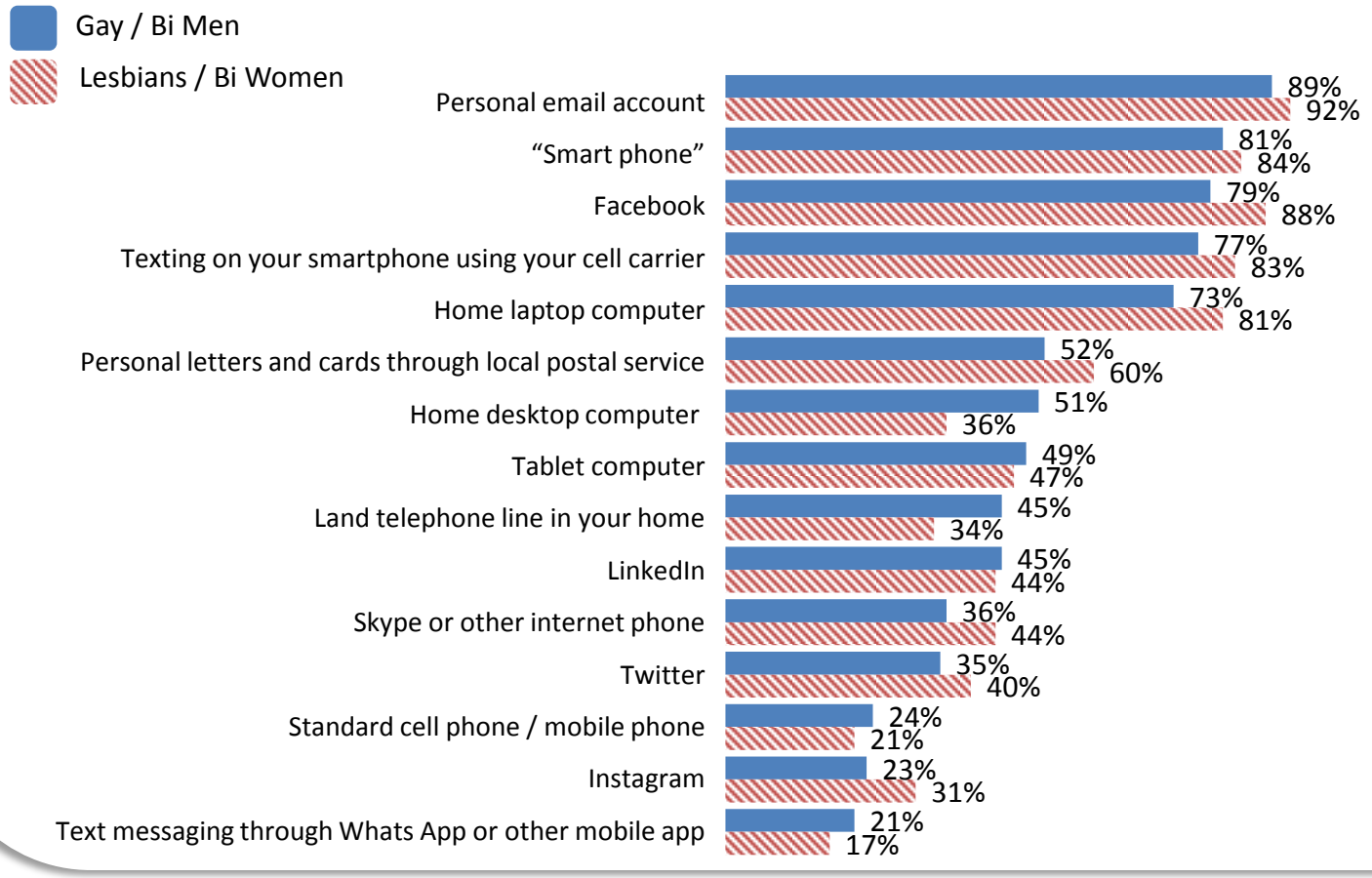
In the past 7 days, have you read, viewed, or listened to...? *(Please select all that apply.)*



Bases: Bisexual Women n=852; Bisexual Men n=964; Transgender n=441

Personal Communication: Smart phones, email, Facebook and texting are nearly universal in the LGBT community. Landlines have now fallen below 50% ownership.

Do you own or use any of the following tools for your **personal communication** (not work)?
(Mark all that apply.)



Bases: Gay and Bisexual Men n=9,344; Lesbians and Bisexual Women n=3,499

Personal Communication: Smart phones, email, Facebook and texting are nearly universal in the LGBT community. Landlines have now fallen below 50% ownership.

Do you own or use any of the following tools for your **personal communication** (not work)?
(Mark all that apply.)

	Millennials	Generation X	Baby Boomers
Personal email account	**91%**	**91%**	**89%**
Facebook	91%	86%	76%
"Smart phone	90%	89%	75%
Texting on your smartphone using your cell carrier	88%	86%	71%
Home laptop computer	84%	78%	72%
Skype or other internet phone	52%	38%	32%
Twitter	50%	43%	27%
Instagram	48%	29%	12%
Personal letters and cards through local postal service	47%	52%	59%
Tablet computer	**41%**	**55%**	**48%**
LinkedIn	**40%**	**51%**	**44%**
Text messaging through Whats App or other mobile app	28%	25%	13%
Home desktop computer	27%	44%	55%
Land telephone line in your home	17%	33%	58%
Standard cell phone / mobile phone	16%	17%	29%

Bases: Millennial Generation (1987-1981) n=3,158; Gen X (1980-1965) n=4,051; Baby Boomers (1964-1946) n=5,594

For more information:

CMI's highly specialized services are based on 20+ years of dedicated experience, producing LGBT (lesbian, gay, bisexual, transgender) market intelligence for leading corporate clients and organizations across the country and around the world.

Serving a variety of industries, we leverage our in-house proprietary panel of more than 70,000 community-representative LGBT 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 LGBT research/sales/marketing/best practices corporate training and conference presentations.

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

Community Marketing & Insights

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info@CommunityMarketingInc.com

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CMI Community Marketing & Insights

Community Marketing, Inc.

The LGBT community is dynamic and diverse, reflecting the spectrum of the general population: From young to old, ethnicities, gender identities, relationship status, income, etc. Narrow marketing strategies viewed LGBT as one community, one market. However, with the sophistication of LGBT consumer research today, market leaders can identify the "segments" of the LGBT community best matched to their products and services. With our representative panel of over 70,000 LGBTs who actively engage with LGBT media, events and organizations, Community Marketing & Insights can identify and deliver the best-matched panel for your research initiative and marketing goals.

Community Marketing, Inc. (CMI) is an NGLCC-Certified LGBT-Owned Business Enterprise. We've been helping a wide variety of industry leaders master the subtleties of this market **since 1992**. Our unique and specialized services are based on 20+ years of experience and industry leading case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), strategic consulting and corporate training.

Whether your organization is just learning about the market, or is updating its strategy, **Community Marketing & Insights** can accelerate your plans, reduce your risks and deliver *measurable* results. CMI's proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing & Insights has earned its position as the global leader in LGBT market research and development. Through the company's tireless efforts, "doors have opened" around the world for the spectrum of LGBT consumers. We have helped grow LGBT market recognition through research, media relations and education; and have brought opportunities to many of the world's leading marketers.

Community Marketing & Insights projects include these and many other market leaders:

- ABSOLUT Vodka (Pernod Ricard)
- Aetna Insurance
- American Cancer Society
- Chicago History Museum
- Credit Suisse
- E. & J. Gallo Winery
- Esurance (an Allstate Company)
- Gilead Pharmaceuticals
- Hawaiian Airlines
- Hyatt Hotels & Resorts
- Japan National Tourism Organization
- Kaiser Family Foundation
- Kimpton Hotels & Restaurants
- Las Vegas CVA
- Merz Radiesse
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- OraSure Technologies
- Prudential Financial
- Tourism Office of Spain
- Target Brands
- U.S. Government: Census Bureau and HUD (Housing & Urban Development)
- Wells Fargo Bank

And many more…

CMI Community Marketing & Insights
Community Marketing, Inc.

CMI'S LGBT
CONSUMER RESEARCH PANEL 2014-15

DID YOU KNOW...?

The LGBT community is dynamic and diverse, reflecting the spectrum of the general population: From young to old, ethnicities, gender identities, relationship status, income, etc. Narrow marketing strategies viewed LGBT as one community, one market. However, with the sophistication of LGBT consumer research today, market leaders can identify the "segments" of the LGBT community best matched to their products and services. With our representative panel of over 70,000 LGBTs who actively engage with LGBT media, events and organizations, Community Marketing & Insights can identify and deliver the best-matched panel for your research initiative and marketing goals.

CMI'S LGBT CONSUMER PANEL: WHAT MAKES IT UNIQUE?

• Accurate, targeted market intelligence
Utilizing quantitative and qualitative market research methodologies, Community Marketing & Insights helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

• The largest, most representative panel
With over 20 years in business, Community Marketing & Insights has developed a research panel of more than 70,000 LGBT consumers. We've partnered with media outlets and LGBT-oriented organizations and events throughout the country and around the world to recruit a qualified panel that is geographically representative of the LGBT population.

• Candid responses, honest feedback
As an LGBT-owned and –operated firm, we've established trust with our panelists. We speak their language and know how to communicate effectively with them. As a result, our panelists are willing to talk with us frankly and frequently, even about sensitive issues.

• Community Marketing & Insights experience & expertise
Since 1992, Community Marketing & Insights has provided market research, corporate training and marketing planning services to a wide variety of clients. We've provided LGBT consumer intelligence to numerous market leaders including Wells Fargo Bank, Target Brands, Prudential, Johnson & Johnson, Aetna, ABSOLUT Vodka, MillerCoors Brewing Co., Japan National Tourism Organization, Tourism Office of Spain, E&J Gallo Wineries, OraSure Technologies, Chicago History Museum, Tourism Toronto, MetLife, Hyatt Hotels & Resorts, and many other companies, as well as the American Cancer Society, Kaiser Family Foundation , IFAW, UPenn, CUNY, and the U.S. Government (Census Bureau and H.U.D.).

We also present public and custom onsite educational seminars and workshops. Community Marketing & Insights has produced or presented at LGBT marketing symposia on six continents.

Learn more on our website, www.communitymarketinginc.com

Community Marketing, Inc., 584 Castro St. #834, San Francisco CA 94114 USA • 415/437-3800

SAMPLE DEMOGRAPHICS OF USA LGBT PANELISTS

48 MEDIAN AGE

41% SINGLE/NOT IN A RELATIONSHIP
19% LEGALLY MARRIED
5% CIVIL UNION OR REGISTERED DOMESTIC PARTNER

65% COLLEGE GRADUATES INCL. BACHELORS+
75% ARE EMPLOYED
57% HHI >$50K

5% PURCHASED A HOME IN THE PAST 12 MONTHS
8% PLAN TO PURCHASE A HOME IN THE NEXT 12 MONTHS
39% PURCHASED A MAJOR VACATION (5 NIGHTS+) IN THE PAST 12 MONTHS
46% PLAN TO PURCHASE A MAJOR VACATION (5 NIGHTS+) IN THE NEXT 12 MONTHS

44% DRINK WINE WEEKLY
42% DRINK BEER WEEKLY
49% DRINK SPIRITS OR COCKTAILS WEEKLY

PAST 12 MO. PURCHASES
17% AUTOMOBILE
15% FURNITURE
60% PERFORMING ARTS TICKETS
10% MAJOR KITCHEN APPLIANCES ($500+)
24% LGBT FUNDRAISING GALA TICKETS

52% "LIKED" A BUSINESS ON FACEBOOK
61% READ LGBT BLOGS / WEBSITES
31% CLICKED ON A FACEBOOK AD
42% CLICKED ON A MOBILE APP AD
22% USE LGBT MOBILE APPS

66% CARE FOR PETS

SHARED OR RETWEETED A COMMERCIAL AD OR ANNOUNCEMENT 14%
TWEETED DURING A TELEVISION SHOW USING A RECOMMENDED #HASHTAG 9%
TUNED INTO A TELEVISION SHOW AFTER SEEING RELATED TWEETS 9%
USED SOCIAL MEDIA TO VOICE A POSITIVE EXPERIENCE WITH A BRAND OR PRODUCT 34%
USED SOCIAL MEDIA TO VOICE A NEGATIVE EXPERIENCE WITH A BRAND OR PRODUCT 24%

AND MORE!

CMI Community Marketing & Insights
Community Marketing, Inc.

LGBT Market Research:

There is a difference!

Market research studies and resulting statistics are meant to help marketers understand the LGBT communities, and influence educated decisions about their strategies and tactics. However, *not all research is the same.* **Community Marketing & Insights** methodologies and experience are distinct from those of others when considering approaches, respondent panels—and ultimately—the validity and utility of sought-after results.

WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has developed our proprietary consumer panel over the past 20+ years by circulating field surveys at leading LGBT events, and by partnering with LGBT organizations and media across the USA, Canada, the UK, and around the world. These partners distribute our survey invitations via print ads, web banners, email broadcasts and social networks to their memberships and/or readers. The resulting panels are highly representative of LGBT consumers who interact with the LGBT community and media. *This is important:* If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations. CMI research is trusted by—and frequently quoted in—the *New York Times, USA Today,* the *Wall Street Journal, Forbes, Chicago Tribune, Los Angeles Times, Miami Herald, Ad Week,* NPR, CBS News, Associated Press, etc.

Other providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate that they are gay or lesbian in the context of a survey. This approach, attempting to "represent the gay community at large," may be appropriate for direction in sociological or academic studies, but not for developing clear, representative advertising or marketing related strategies. Other researchers use lists from one or two LGBT publishers, which may skew results. For marketers desiring valid LGBT consumer insights about products, services, advertising creative and marketing strategies, these panel development approaches are not likely to yield LGBT community members who are interacting with the media where you are placing ads.

IN RESEARCH, SIZE *DOES* MATTER.

CMI has conducted over a hundred LGBT-dedicated research studies since the early '90s, covering a wide variety of topics, industries and interests. Through our work, we both observe and influence the trends of this market. Size does matter in the case of research. Our research panel has grown to over 70,000 qualified LGBT consumers, the largest of its kind, by far. Our 6th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 148 countries, making it the largest such study in history. We leverage our long history/experience/expertise for your benefit, and fine-tune our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of the panel, or "reinvent the wheel" at your expense. One cannot fathom the diversity and complexities within LGBT (see below) on a small sample. And with small samples, you loose the opportunity to derive statistically-significant cross tabs on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a 28 year old lesbian in Seattle has the same purchasing motivations and behaviors as a 67 year old gay man in Atlanta? Generalities and sweeping statements about "the gay market" based on comparatively small samples can distort the results of research findings, potentially wasting your investment of time and resources.

DIVERSITY: THERE IS NO "LGBT MARKET"

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

General surveys on "the gay market" are likely to only scratch the surface of the diversity and varieties of opportunities marketers can enjoy if properly explored and understood.

continues...

TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE

Since 1994, CMI has taken pride in operating the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. *Quantitative* (data) research is one important side of a coin, but only tells half of the story. The other side of a comprehensive research initiative involves *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 and Australia, as well as many secondary markets. We've found that the same creative, tested in different regions, often yields substantially differing results. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns? CMI is the *only* LGBT-dedicated research provider that produces and facilitates LGBT focus group studies and other *qualitative* research options. We have developed and reported on focus groups covering a wide variety of topics, plus we have operated telephone interviews, field surveys, advisory board series and multi-year customer satisfaction survey projects which can round out a comprehensive market intelligence plan.

Producing only online surveys, other research companies are telling 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 are only uncovered in qualitative research... extremely important considerations that averages and extrapolated assumptions based only on survey statistics are likely to miss.

WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We do all of our research in-house, because nobody knows this market segment as well as we do. We never sell or rep another company's services, nor will we outsource your project to a 3rd party.

Some firms work as reps of research companies, or outsource clients' projects, and report on the results of the 3rd party's work. But without being intimately involved in every aspect of the project, from discussing the client's goals and designing the study, to building the survey, implementing it and writing the report, and without engaging directly with consumers in focus groups, it is difficult to gain the insights that can only come from CMI's hands-on LGBT research specialization spanning nearly two decades.

TRUSTED

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

PROUDLY LGBT-OWNED AND -OPERATED

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

COMMUNITY CITIZENSHIP

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

VALUE

You'd think that with this kind of specialization and experience, you'd be investing considerably more for **Community Marketing & Insights** services than for research from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 60+ years of dedicated LGBT research among the CMI team, that we can actually keep your costs low. We are not spending your money to locate qualified survey or focus group participants, nor are we spending our time (or your money) trying to source comparative data or case studies. We've done all that over the past 20 years for your benefit. And we are not running a large operation that juggles many accounts and projects of differing scope and focus. CMI's client dedication and market specialization delivers you superior intelligence at a fraction of the cost of other firms.

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