

CMI's 11th Annual LGBT Community Survey[®]

USA Report July 2017

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ABOUT CMI: 25 YEARS OF LGBT INSIGHTS

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

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

CMI's research clients include leaders from a wide range of industries. CMI studies have been produced for these and many other clients: Wells Fargo Bank, Credit Suisse, SunTrust Bank, Aetna Insurance, Aurora Health Care, MetLife, Prudential, DIRECTV, Target Brands, Johnson & Johnson, WNBA, Esurance, Absolut Vodka, Hallmark, Greater Fort Lauderdale CVB, Las Vegas CVA, NYC & Company, Hyatt Hotel Corp., Tourism Toronto, Argentina Tourism Office, Tourism Office of Spain, Hawaiian Airlines, United States Census Bureau, US Housing & Urban Development, American Cancer Society, Kaiser Family Foundation, and numerous other corporations and organizations across North America and around the world.

ABOUT CMI's 11th ANNUAL LGBT COMMUNITY SURVEY

ASSUMPTIONS & METHODOLOGY

INVITATION TO PARTICIPATE

Over 180 global study partners participated in recruiting LGBT community members to complete the survey. A full list is presented on slide 5. Partners include LGBT media, events and organizations. Partners used a combination of print ads, digital ads, apps, membership email broadcasts, blogs and social media for recruitment.

GLOBAL SURVEY RESPONDENTS

Over **41,000** respondents across **131 countries** participated in the 2017 survey, which was fielded in English, Spanish, French, German, and Hungarian.



USA RESPONDENTS OVERALL

This report focuses on the **U.S. data** for **over 12,400** self-identified gay and bisexual men, **over 3,600** lesbian and bisexual women and **over 1,300** transgender and gender expansive community members (total of **17,300** USA participants; age range 18 to 75).



HIGHLIGHTS FROM THE 2016 COMMUNITY SURVEY

This report contains an additional section featuring highlights from our 10th annual report. Some of our questions are asked every other year, and important results from 2016 are provided.

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

**Grab a coffee,
take a survey,
change the world.**

Making a Difference is Easy.

**Take the 11th Annual
LGBT Community Survey®**

LGBTsurvey.com

CMI Community Marketing & Insights
Community Marketing, Inc.

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

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

ABOUT CMI'S 11th ANNUAL LGBT COMMUNITY SURVEY

ASSUMPTIONS & METHODOLOGY

IDENTITY

The Community Marketing & Insights (CMI) Annual LGBT Community Survey® utilizes a cultural definition of LGBT. This study allows participants to self-identify with a wider and more inclusive spectrum of identities within the LGBT community (see slide 6). In addition, the survey allows participants to select *all that apply* for multiple gender, sexual, and community identities. For example, a participant may identify as transgender and a straight woman, or queer and a gay man, or any combination that the participant feels comfortable with.

RECRUITMENT SOURCES

Survey respondents are recruited through CMI's proprietary LGBT research panel, and in partnership with 180+ global LGBT media, events and organizations (see slide 5). Study participants are community members who are interacting with the LGBT community, and who can be reached through LGBT events, organizations and media communications. Because study partners do not necessarily attract LGBTs in proportionate 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.

SEGMENTATION & WEIGHTING

Identity data presented includes gay and bisexual men, lesbian and bisexual women and gender expansive. Generations reported include Millennial Plus (born 1981-1998), 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 LGBT* results. However, when the report does present an "all LGBT" result, it is based on two broad weighting assumptions: (1) Each of the three 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 a 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, and T.

The survey's Gender Expansive category includes participants who identify as transgender, trans men, trans women, genderqueer, gender fluid, non-binary (gender), 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, LGBT media, events and organizations. Because of the recruitment sources, results do not show substantive differences between gay vs. bisexual men, or lesbian vs. bisexual women, which is the reason we combine into one category.

CMI's 11th ANNUAL LGBT COMMUNITY SURVEY • RESEARCH PARTNERSIn partnership with 

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

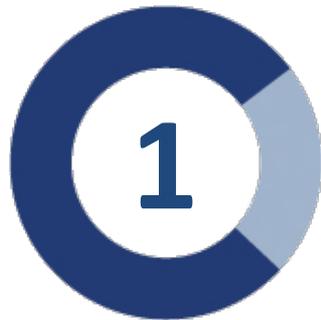
- !Omg Blog!
- #Boom Media
- A&U Magazine
- Adelante Magazine
- Ambush Magazine
- Atlanta Pride
- Austin Gay & Lesbian Chamber of Commerce
- Baltimore OUTloud
- Bay Area Reporter
- Bear World Media
- Bellingham Pride
- Between The Lines /PrideSource
- Big Boy Pride
- BleuLife Media
- boiMAG
- BRO (The Bro App)
- Cale Creative/ Dopesontheroad.com
- Camara de Comerciantes LGBT de Colombia
- Camp Magazine
- Canadian Gay & Lesbian Chamber of Commerce
- Center For Black Equity
- CenterLink: The Community of LGBT Center
- ChicagoPride.com
- Circle of Voices Inc.
- Cleveland Pride Inc.
- Communication Services
- Connexions Magazine, LLC
- DailyXtra.com
- Dallas Voice
- Damron
- David Atlanta
- DecorHomme
- Delta Foundation of Pittsburgh
- Denver Gay & Lesbian Chamber of Commerce
- Desert Daily Guide Palm Springs
- Detroit Regional LGBT Chamber Fund, Inc.
- Diversity Rules Magazine
- DNA Magazine
- ELIXHER
- elgeeBE - The LGBTQ Travel Community
- EnGAYged Weddings Inc.
- Episcopal Diocese of Atlanta
- Equally Wed
- Erie Gay News
- Fantasia Fair
- Federation of Gay Games
- FENUXE Magazine
- Fugues Magazine
- Gay Ad Network
- Gay City News
- GayDesertGuide.com/Oasis Marketing Group
- Gay San Diego
- GAY to Z Directory
- Gayborhood
- GayCalgary
- GayCities
- GayRVA.com
- Gayvan.com Travel Marketing
- GBMNews
- GED MAGAZINE
- Georgia Voice
- GoGUIDE
- Golden Gate Business Association
- Goliath Atlanta
- GRAB Magazine
- Greater Fort Lauderdale Gay & Lesbian Chamber of Commerce
- Greg In Hollywood
- Grindr, LLC
- GSBA / Travel Gay Seattle
- Guide arc-en-ciel / Quebec Rainbow Guide
- Harlem Pride
- Hayden's List
- HepMag.com
- Hornet App
- Hotspots Media Group
- Humen Media Group
- ImageOut - The Rochester LGBTQ Film Festival
- In the Life Atlanta
- Indy Pride, Inc.
- Infolettre de Fugues / Fugues.com
- instinctmagazine.com
- Joe.My.God.
- Kennethinthe212
- L Style G Style
- Lambda Business Association
- Lavender Magazine
- Lesbian News
- Lesbian.com
- LGBT Confex
- LGBT Weddings, Inc.
- LGBTQ Nation
- LGBT-Today.com
- Loop Magazine
- Los Angeles Blade
- Many Voices
- Metro Weekly
- Miami Dade Gay & Lesbian Chamber of Commerce
- Miami Herald Media Company
- Mid-America Gay & Lesbian Chamber of Commerce
- mister10
- misterbnb
- My Gay Houston
- NAGLREP - The National Association of Gay & Lesbian Real Estate Professionals
- Nashville LGBT Chamber of Commerce
- Navigaytour
- New Leaf Columbus
- NJ LGBT Chamber Of Commerce
- North American Gay Volleyball Association
- North Star LGBTQ Community Center
- ONE Community
- Our Lives magazine
- Out & About Nashville
- Out Front Magazine
- OUT IN JERSEY INC
- Out Post
- Out Professionals
- Outlook Media, Inc
- OutSmart Magazine
- Outword
- PASSPORT Magazine
- Pink Banana Media
- Plexus LGBT & Allied Chamber of Commerce
- POZ.com
- PrideWire
- Pridezillas.com
- Project Q Atlanta
- PROUD FM
- Q Magazine
- Q Voice News
- QLife Magazine
- QNotes
- QSaltLake Magazine
- queer.de
- Queerty
- RAGE monthly magazine
- Rainbow Chamber of Silicon Valley
- Reaching Out MBA
- RealHealthMag.com
- San Francisco Bay Times / "Betty's List"
- SaneMag.com
- Santa Fe Pride
- Smart + Strong
- South Florida Gay News
- Spartacus Traveler
- Squirt.org
- St Pete Pride
- SunServe
- Tagg Magazine
- The Center: 7 Rivers LGBTQ Connection
- The Content Wrangler
- The DC Center
- The Gay & Lesbian Review
- The Gayly
- The GLBT Center of Central Florida
- The G-Listed
- The GLO Center
- The Hub at the LGBT Visitor Center in Miami Beach
- The LGBT Community Center of the Desert
- The LGBTQ Center in South Bend, Indiana
- The Montrose Star Newspaper
- The Pride Guides®
- The Rainbow Times
- The Seattle Lesbian
- therepubliq
- Towleroad
- TuSaludMag.com
- Unite Virginia - Virginia's LGBTQ Media Company
- US LGBT Soccer
- Venice Pride
- VIP Media Group
- Washington Blade
- Watermark Publishing Group
- We Are Family magazine
- Whistler Pride and Ski Festival - GayWhistler.com
- Windy City Times
- Wisconsin LGBT Chamber
- Worcester Pride
- Zip

Special thanks to our translation partners!



Research Participants and LGBTQ Identity: Please see slide 4 for more information about the methodology and participants. Among the survey participants, the terms used to express sexual orientation, gender identity, and cultural identity are changing, especially among younger participants, and among those identifying as women or gender expansive. Gender expansive includes those who describe themselves as transgender, trans man, trans woman, intersex, non-binary gender, genderqueer, and/or gender fluid. Multiple identities were permitted in the question.

How do you identify within the LGBTQ community? (Please mark all that apply.)	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Among All LGBT Millennials+ (Weighted by Gender Identity)
Lesbian or Gay Woman	-	82%	23%	34%
Gay Man	94%	-	13%	43%
Bisexual Woman	-	23%	10%	18%
Bisexual Man	9%	-	10%	6%
Pansexual	1%	5%	15%	7%
Same Gender Loving	3%	3%	6%	4%
Non-binary (sexual orientation)	<1%	1%	6%	2%
Asexual	1%	2%	5%	3%
Queer	7%	18%	37%	24%
Transgender	1%	3%	45%	6%
Trans Man	1%	<1%	22%	4%
Trans Woman	<1%	3%	27%	3%
Genderqueer	1%	3%	21%	5%
Gender Fluid	1%	3%	21%	5%
Non-binary (gender)	1%	4%	25%	7%
Intersex	<1%	<1%	4%	1%
Agender	<1%	1%	3%	1%



LGBT Demographics

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

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

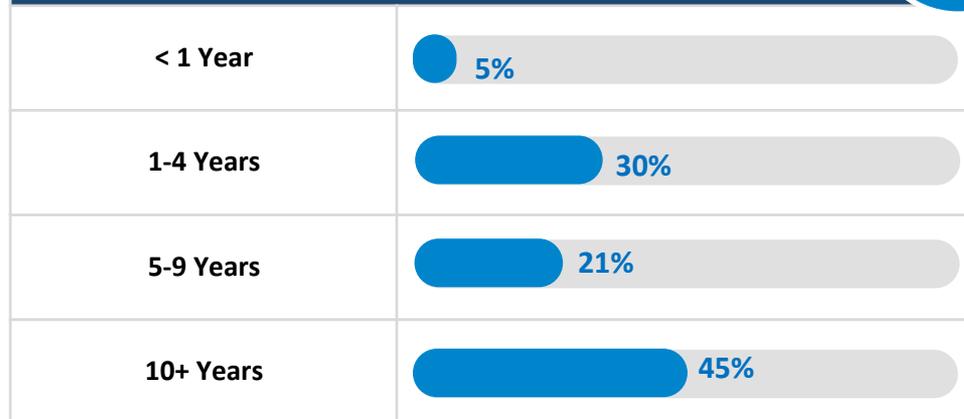
Marriage Trends: We asked married participants how long ago they got married, as well as how long the period was between meeting and marriage. The results point to the surge in same-sex marriage over the past 5 years as various states, and then the nation, adopted marriage equality. The data also suggests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

**You indicated that you are legally married.
How long ago did you get married?**

< 1 Year	12%
1-2 Years Ago	24%
3-5 Years Ago	33%
6+ Years Ago	31%
Prefer not to answer	0.17%

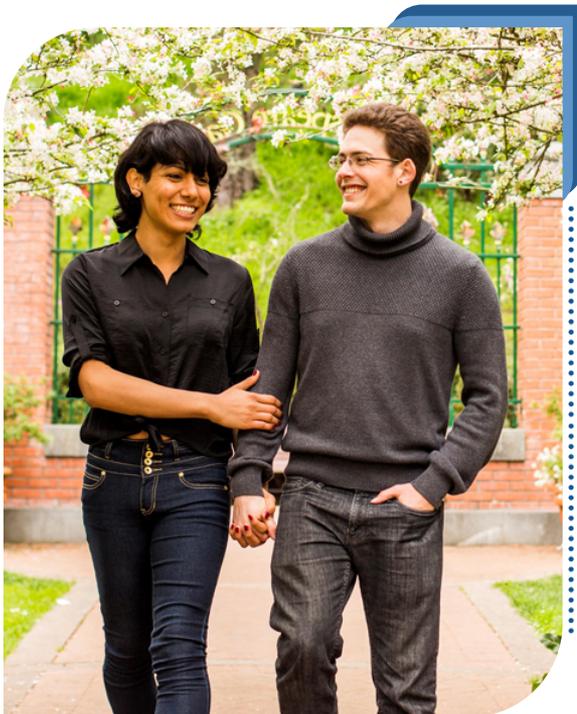
AMONG RECENTLY MARRIED (PAST 2 YEARS)

What was the period from the time you started dating until the time you got legally married?



Prefer not to answer (.16%)

Relationships: As a new question in 2017, we wanted to explore and acknowledge that not all relationships are “binary;” a same-sex or opposite-sex couple. Many community members are in a relationship where at least one partner identifies as other than male or female.



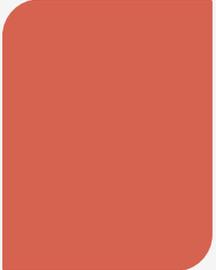
You indicated that you are in a relationship. How would you describe your relationship?	Lesbian Women	Bisexual Women	Gay Men	Bisexual Men	Gender Expansive
Same-sex relationship	96%	47%	98%	33%	39%
Opposite-sex relationship	1%	40%	1%	60%	25%
Non-binary identified relationship (at least one partner identifies other than male or female)	2%	7%	<1%	5%	26%
Other	1%	6%	<1%	2%	9%

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

Do you have children? (Please mark all that apply.)	Gay & Bisexual Men			Lesbians & Bisexual Women			Gender Expansive		
	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+
Yes, children under age 18 living in my home.	2%	6%	2%	11%	27%	4%	6%	15%	5%
Yes, children under age 18 not living in my home.	1%	2%	1%	1%	3%	1%	1%	5%	2%
Yes, children over age 18.	0%	6%	19%	0%	16%	34%	0%	13%	51%
No	97%	87%	78%	88%	58%	61%	92%	68%	43%
Prefer not to answer	0%	1%	0%	0%	1%	1%	1%	2%	1%

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

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



Where We Live: Perceptions of Community LGBT-Friendliness

Living Environment: LGBT community members live in a wide variety of communities. Gay and bisexual male participants report that they are more likely to live in big cities, compared to lesbian and bisexual women. Also of note is the wide variety of communities where participants who identify as gender expansive live. This emphasizes the importance of national and statewide anti-discrimination laws to protect all gender expansive community members, not just laws in the big cities.

What type of environment best describes the place in which you live?	Gay & Bisexual Men	Lesbians & Bisexual Women	All Gender Expansive
Urban / big city 	 42%	 32%	 28%
Medium sized city 	 21%	 24%	 22%
Small city 	 11%	 11%	 14%
Suburb 	 16%	 18%	 19%
Small town / surrounded by rural areas 	 7%	 10%	 11%
Rural area / countryside 	 4%	 5%	 7%

LGBT-friendly Perceptions of Country, State and Community: Canadians are far more likely than United States residents to consider their country LGBT-friendly. However, that difference starts to even out when asked about their local communities. Most LGBT-participants considered their local community to be LGBT-friendly, which may be an indication that LGBT people move to places where they feel more welcome. The state-by-state analysis was most fascinating, as people living in “blue” states had high praise for their state and local community, and those living in deep “red” states had negative perceptions of their state, but more positive perceptions of their local community.

Do you agree or disagree with these statements?		Country Breakout		State Breakout				
		USA 	Canada 	California	Texas	New York	Florida	MS + AL + KS + OK + NE + AR
I live in an LGBT-friendly city, town, or community.	Agree	82%	89%	92%	78%	92%	86%	53%
	Disagree	18%	11%	8%	22%	8%	14%	47%
I live in an LGBT-friendly state or province.	Agree	66%	92%	99%	19%	98%	56%	9%
	Disagree	34%	8%	1%	81%	2%	44%	91%
I live in an LGBT-friendly country.	Agree	56%	98%	56%	59%	59%	62%	57%
	Disagree	44%	2%	44%	41%	41%	38%	43%

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

LGBT-friendly Perceptions of Type of Community: United States LGBT community members living in big cities feel far more positive about their local communities than do those living in rural America. Only about half of those living in rural areas and small towns felt that their local communities were LGBT-friendly. However, many of these rural LGBT Americans had more favorable perceptions about their states, suggesting that many may live in rural areas of more progressive states.

Do you agree or disagree with these statements?		Country	USA Community Breakout		
		USA LGBT 	Urban / Big City	Suburb	Small Town + Rural
I live in an LGBT-friendly city, town, or community.	Agree	82%	95%	78%	54%
	Disagree	18%	5%	22%	46%
I live in an LGBT-friendly state or province.	Agree	66%	73%	69%	62%
	Disagree	34%	27%	31%	38%
I live in an LGBT-friendly country.	Agree	56%	59%	59%	55%
	Disagree	44%	41%	41%	45%

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

LGBT-friendly Perceptions by Gender and Generation: There are clear gender differences in LGBT-friendliness perceptions. Gay and bisexual men are somewhat more positive than lesbian and bisexual women about their communities. Participants who identify as gender expansive are least positive about their communities. No substantial differences in perceptions were found when evaluating this question by generation.

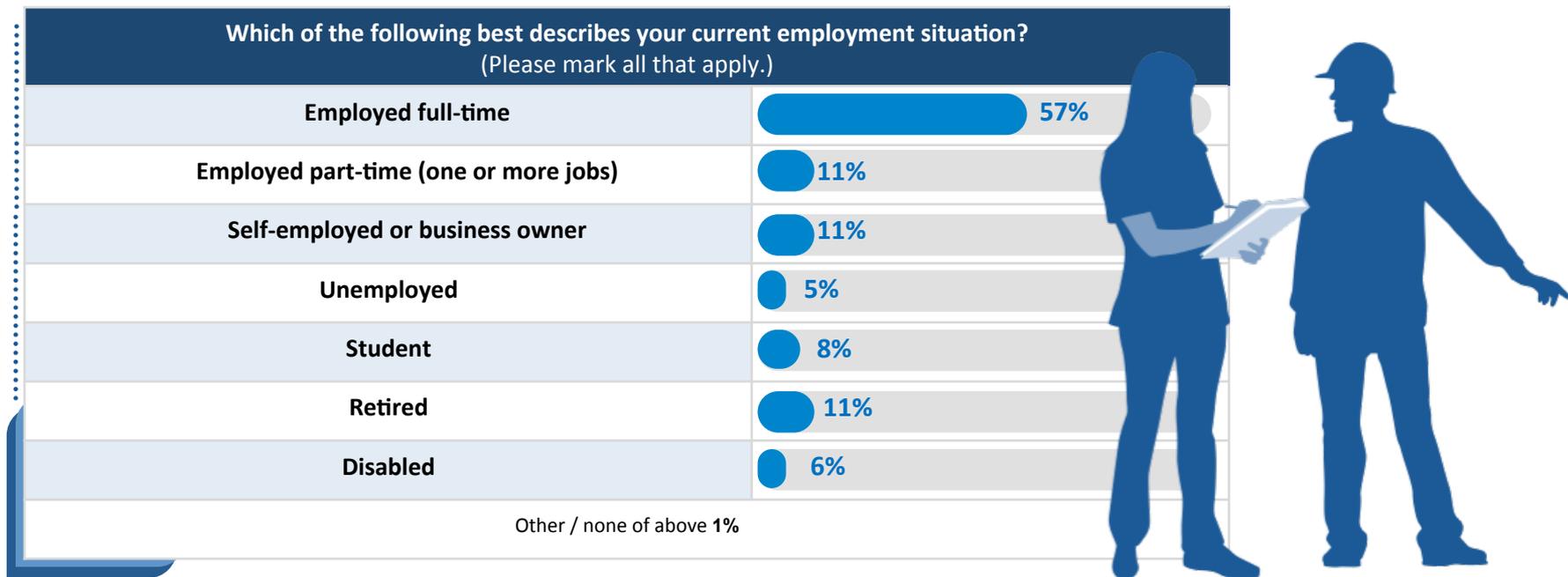
Do you agree or disagree with these statements?		USA Gender Breakout			USA Generation Breakout		
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
I live in an LGBT-friendly city, town, or community.	Agree	85%	81%	76%	81%	83%	83%
	Disagree	15%	19%	24%	19%	17%	17%
I live in an LGBT-friendly state or province.	Agree	68%	65%	64%	65%	66%	69%
	Disagree	32%	35%	36%	35%	34%	31%
I live in an LGBT-friendly country.	Agree	60%	53%	44%	56%	56%	55%
	Disagree	40%	47%	56%	44%	44%	45%

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



LGBT Employment and Business Owners

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

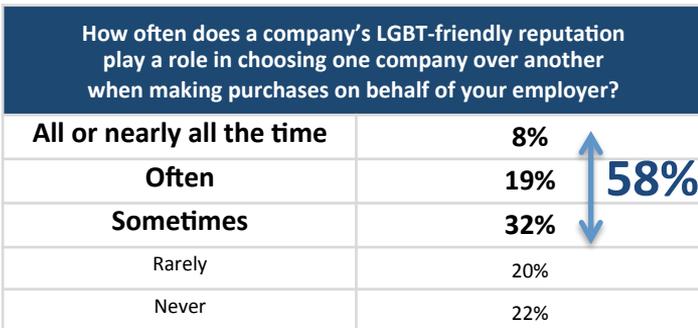


Power of LGBT Business Spending: Many studies have focused on the power of LGBT consumer spending. This question looks at LGBT spending from a different perspective: LGBT community members who control budgets for their employers. As indicated in charts below, being an LGBT-friendly company influences purchasing power beyond the individual, and may significantly impact business spending.

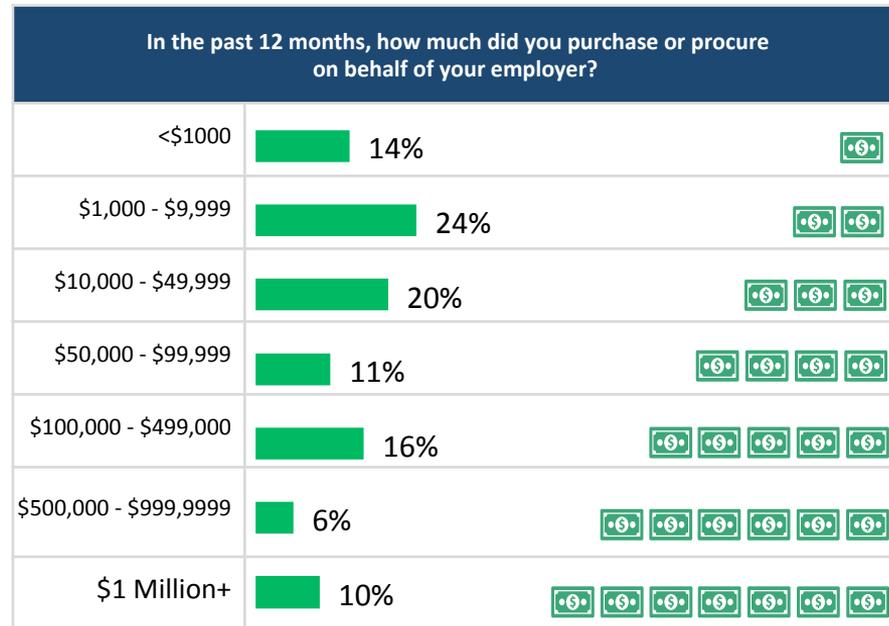
AMONG THOSE EMPLOYED OR BUSINESS OWNERS



AMONG BUDGET CONTROLLERS



AMONG BUDGET CONTROLLERS



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

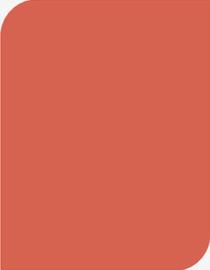
LGBT Business Owners: A healthy 11% of LGBT participants indicated that they are self-employed or a small business owner. Most (90%) were small businesses with fewer than 10 employees. Fewer than 10% of the LGBT-owned businesses are registered as LGBT Business Enterprises, indicating that significant growth may be achieved in these programs in the coming years. Community Marketing & Insights is an NGLCC Certified LGBT-Owned Business Enterprise.

AMONG SELF-EMPLOYED / OWNERS



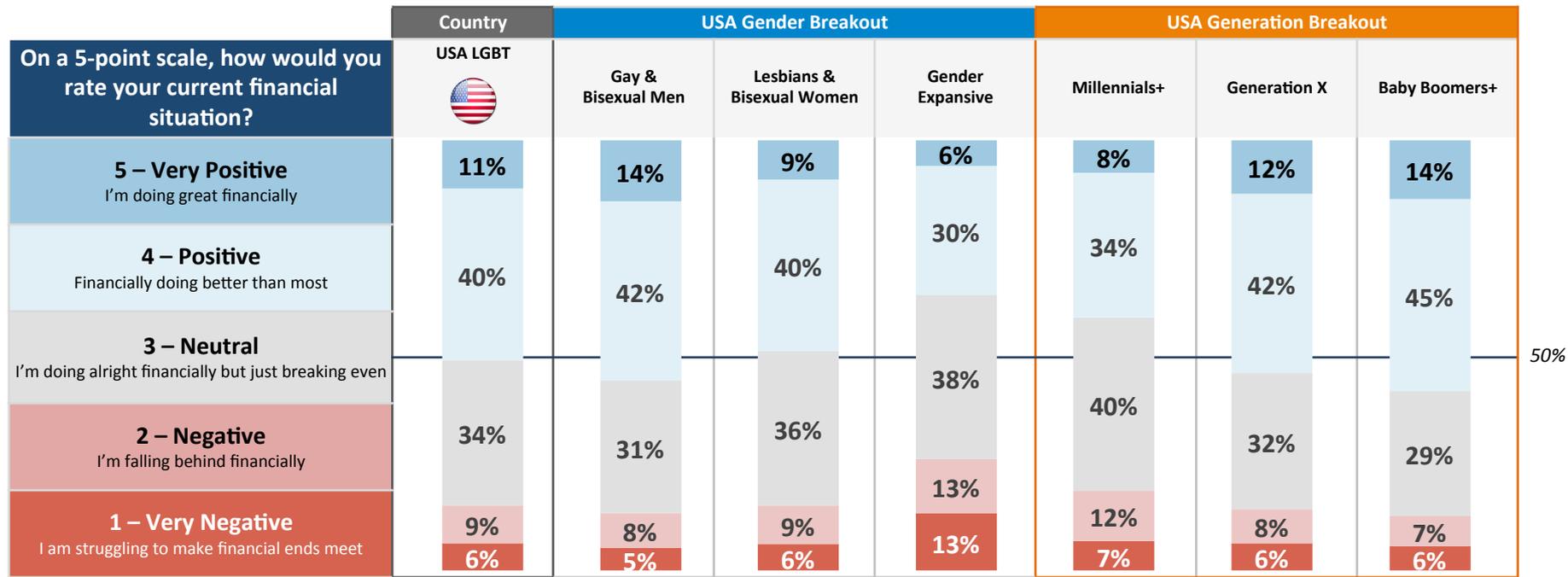
AMONG SELF-EMPLOYED / OWNERS





LGBT Consumer Purchasing

LGBT Economic Outlook: The LGBT community generally has a positive economic outlook, with 51% viewing their economic situation favorably, 34% neutrally, and 14% negatively. There was not a significant overall index change in economic outlook since 2016, but there was a small downgrade of those who felt “very positive,” moving to just “positive.”



Base: USA n=17,420;
Gay & Bisexual Men n=12,459; Lesbian & Bisexual Women n=3,616; Gender Expansive n=1,345;
Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

Items Purchased in the Past 12 Months

Have you (or you and your partner) purchased any of the following major items during the past 12 months? (Please mark all that apply.)	Country	USA Gender Breakout			USA Generation Breakout		
	USA LGBT 	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 A new smartphone	51%	53%	49%	47%	51%	56%	46%
 A new laptop or desktop computer for personal use	31%	33%	29%	30%	27%	33%	32%
 Major piece of furniture (U.S. \$500 or more)	24%	28%	21%	16%	19%	29%	24%
 Purchased (or leased) a new automobile	22%	23%	22%	17%	19%	24%	22%
 Audio or visual electronics for home (U.S. \$500 or more)	21%	26%	16%	16%	16%	24%	22%
 A new suit, dress or expensive clothing item (U.S. \$500 or more)	16%	22%	11%	12%	14%	20%	15%
 Major kitchen appliances (U.S. \$500 or more)	15%	17%	13%	11%	8%	17%	20%
 Major home remodel	10%	11%	9%	6%	4%	11%	14%
 Purchased a new primary home or condo	7%	7%	7%	6%	6%	9%	6%
 Purchased a vacation home or timeshare	2%	2%	2%	2%	1%	3%	3%
None of the above	22%	19%	23%	28%	26%	18%	22%

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

Experiences Purchased in the Past 12 Months

Have you purchased any of the following experiences during the past 12 months? (Please mark all that apply.)	Country	USA Gender Breakout			USA Generation Breakout		
	USA LGBT 	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
Short vacation of 1 to 3 nights away	59%	60%	60%	45%	58%	64%	55%
Tickets to a live theater production	48%	52%	47%	36%	42%	51%	52%
Longer vacation of 4+ nights away	48%	52%	47%	32%	42%	52%	50%
Salon services or spa treatments	43%	39%	49%	37%	39%	49%	41%
Tickets to a cultural performance (e.g. ballet, opera, symphony)	41%	44%	40%	32%	37%	43%	44%
Tickets to a headliner music concert or music festival	39%	37%	42%	32%	40%	44%	33%
Tickets to a professional sports team game	23%	21%	26%	16%	23%	27%	19%
Tickets to a non-profit fundraising event of U.S. \$100 or more	21%	24%	19%	18%	12%	25%	28%
None of the above	14%	14%	12%	22%	14%	11%	15%



Alcohol Consumption (Age 21+ and Consumed at Least 1 Drink in the Past Week): Among those who consumed at least one alcohol drink in the past week, there are some clear demographic differences. Millennial gay and bisexual men are the most frequent alcohol consumers (by far), especially of clear and dark spirits. Beer consumption is relatively even by gender. Wine is the most popular alcohol beverage for Baby Boomers.

Age 21+ and Consumed 1+ Alcohol Drinks (Past 7 Days at Home, Restaurants, and Bars)		Gay & Bisexual Men (21+)			Lesbians & Bisexual Women (21+)		
		Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+
	Clear spirits (like Vodka, Gin)	53%	46%	37%	33%	33%	25%
	Beer	44%	34%	26%	40%	34%	27%
	Dark spirits (like Bourbon, Whiskey)	36%	27%	22%	23%	21%	15%
	Red wine	33%	34%	35%	25%	28%	29%
	White wine	30%	31%	31%	23%	24%	26%
	Light beer	21%	16%	12%	12%	12%	10%

Bases: Gay & Bisexual Men (Millennials+ n=2,663, Gen X n=3,934, Boomers+ n=5,763);
Lesbians & Bisexual Women (Millennials+ n=1,212, Gen X n=1,042, Boomers+ n=1,274)

Brand Recall: Every year, CMI asks an unaided “write-in” recall question about brands that participants make a conscious decision to purchase from, because of their pro-LGBT policies or practices. In 2017, we saw Target, Apple, Starbucks and Amazon retain their top four rankings. New to the top 12 rankings are Disney, Nike, and Ben & Jerry’s.

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

Gay & Bisexual Men		Lesbians & Bisexual Women	
 TARGET	 32%	 TARGET	 37%
 Apple	 24%	 Apple	 16%
 STARBUCKS	 16%	 STARBUCKS	 16%
 amazon	 11%	 amazon	 11%
 ABSOLUT.	 9%	 SUBARU	 9%
 The Home Depot	 7%	 The Home Depot	 7%
 American Airlines	 7%	 ABSOLUT.	 5%
 DELTA	 6%	 BEN & JERRY'S	 5%
 Wells Fargo	 6%	 Google	 4%
 macy's	 6%	 Wells Fargo	 4%
 Disney	 5%	 NIKE	 4%
 Google	 5%	 American Airlines	 4%



Political Change

LGBT Movement Priorities by Demographic This section explores various LGBT political and social concerns, and ranks their importance by demographic within the LGBT community. Companies and organizations that understand and authentically address the nuance within LGBT will have a far better chance at successful communications. For example, supporting the charities of the community segment in focus could have a very favorable impact.

Top 3 Concerns with Broad Support

1. Stopping anti-LGBT “religious freedom” legislation
2. LGBT youth issues
3. Supporting LGBT-friendly political candidates

What the following charts show, perhaps not surprisingly, is that the diverse LGBT communities are correspondingly diverse on their top priorities, largely based on their other demographics. Being able to step outside your demographics and supporting the needs of others within the LGBT community may well be important for the entire community to expand political and social freedoms on all fronts.



✓ **Transgender rights** was the top concern for participants that identify as gender expansive, and quite high with lesbian and bisexual women.



✓ **HIV education and care** remains a priority for gay and bisexual men. HIV education and care was also quite high for African American participants.



✓ **Reducing the social & legal obstacles of LGBT parenting** was a top concern for Millennials, which is interesting since most Millennial are not parents (but a large number want to be parents in the future).



✓ **Expanding LGBT senior care** was a top concern for Baby Boomers.



✓ **Ethnic / racial equality within the LGBT community** was the top concern for African American LGBT community members as well as Asian and Latino LGBTs.



✓ **Expanding LGBT roles, visibility and influence in rural areas** was important for those living in rural and small communities.

✓ **International LGBT rights** were most important for Latino and Asian LGBT community members.

LGBT Movement Priorities by Gender and Generation

What are your priorities for the LGBT movement for the next 10 years? Please check the LGBT causes that motivate you to volunteer, donate, support, get involved, etc.	Country	USA Gender Breakout			USA Generation Breakout		
	USA LGBT 	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
Stopping anti-LGBT "religious freedom" legislation	63%	62%	64%	67%	64%	62%	63%
LGBT youth, anti-bullying and/or teen suicide issues	62%	59%	65%	64%	71%	61%	55%
Supporting LGBT-friendly political candidates	55%	57%	55%	50%	50%	54%	62%
Workplace equality	50%	47%	52%	53%	54%	50%	45%
Supporting LGBT political candidates	48%	50%	47%	44%	46%	47%	51%
Protecting and expanding marriage equality	48%	46%	51%	38%	48%	50%	47%
Transgender rights	43%	32%	47%	85%	56%	39%	34%
Expanding LGBT senior care	39%	38%	40%	38%	23%	34%	60%
Ethnic / racial equality within the LGBT community	38%	33%	42%	45%	51%	34%	30%
HIV education and care	32%	44%	21%	29%	39%	30%	28%
Reduce the social & legal obstacles of LGBT parenting	32%	26%	37%	32%	44%	28%	23%
International LGBT rights	30%	32%	27%	32%	39%	26%	24%
Expanding LGBT roles, visibility and influence in rural areas	28%	27%	28%	36%	36%	26%	22%
Expanding LGBT roles and influence in religious communities	17%	15%	18%	21%	19%	14%	17%
Expanding LGBT roles and influence in sports communities	13%	13%	12%	12%	16%	11%	11%
Breast cancer education and care	11%	7%	15%	13%	12%	10%	12%

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

LGBT Movement Priorities by Ethnicity

What are your priorities for the LGBT movement for the next 10 years? Please check the LGBT causes that motivate you to volunteer, donate, support, get involved, etc.	Country	USA Ethnicity Breakout			
	USA LGBT 	African American/Black	Latino	Asian / Pacific Islander	Caucasian
Stopping anti-LGBT “religious freedom” legislation	63%	41%	54%	55%	66%
LGBT youth, anti-bullying and/or teen suicide issues	62%	55%	61%	61%	60%
Supporting LGBT-friendly political candidates	55%	41%	51%	51%	59%
Workplace equality	50%	46%	51%	47%	47%
Supporting LGBT political candidates	48%	37%	46%	44%	50%
Protecting and expanding marriage equality	48%	35%	47%	49%	48%
Transgender rights	43%	38%	37%	37%	35%
Expanding LGBT senior care	39%	35%	34%	35%	43%
Ethnic / racial equality within the LGBT community	38%	74%	47%	57%	28%
HIV education and care	32%	52%	46%	42%	35%
Reduce the social & legal obstacles of LGBT parenting	32%	30%	33%	29%	26%
International LGBT rights	30%	26%	37%	42%	29%
Expanding LGBT roles, visibility and influence in rural areas	28%	25%	29%	27%	26%
Expanding LGBT roles and influence in religious communities	17%	21%	16%	19%	15%
Expanding LGBT roles and influence in sports communities	13%	18%	17%	13%	11%
Breast cancer education and care	11%	13%	12%	10%	8%



LGBT Movement Priorities by Community Type

What are your priorities for the LGBT movement for the next 10 years? Please check the LGBT causes that motivate you to volunteer, donate, support, get involved, etc.	Country	USA Community Breakout		
	USA LGBT 	Urban / Big City	Suburb	Small Town + Rural
Stopping anti-LGBT "religious freedom" legislation	63%	62%	64%	64%
LGBT youth, anti-bullying and/or teen suicide issues	62%	59%	60%	61%
Supporting LGBT-friendly political candidates	55%	57%	57%	56%
Workplace equality	50%	46%	49%	46%
Supporting LGBT political candidates	48%	50%	48%	47%
Protecting and expanding marriage equality	48%	45%	48%	50%
Transgender rights	43%	36%	35%	37%
Expanding LGBT senior care	39%	42%	41%	43%
Ethnic / racial equality within the LGBT community	38%	37%	32%	30%
HIV education and care	32%	40%	33%	36%
Reduce the social & legal obstacles of LGBT parenting	32%	26%	27%	31%
International LGBT rights	30%	33%	29%	27%
Expanding LGBT roles, visibility and influence in rural areas	28%	23%	23%	39%
Expanding LGBT roles and influence in religious communities	17%	14%	16%	19%
Expanding LGBT roles and influence in sports communities	13%	13%	11%	13%
Breast cancer education and care	11%	8%	9%	11%



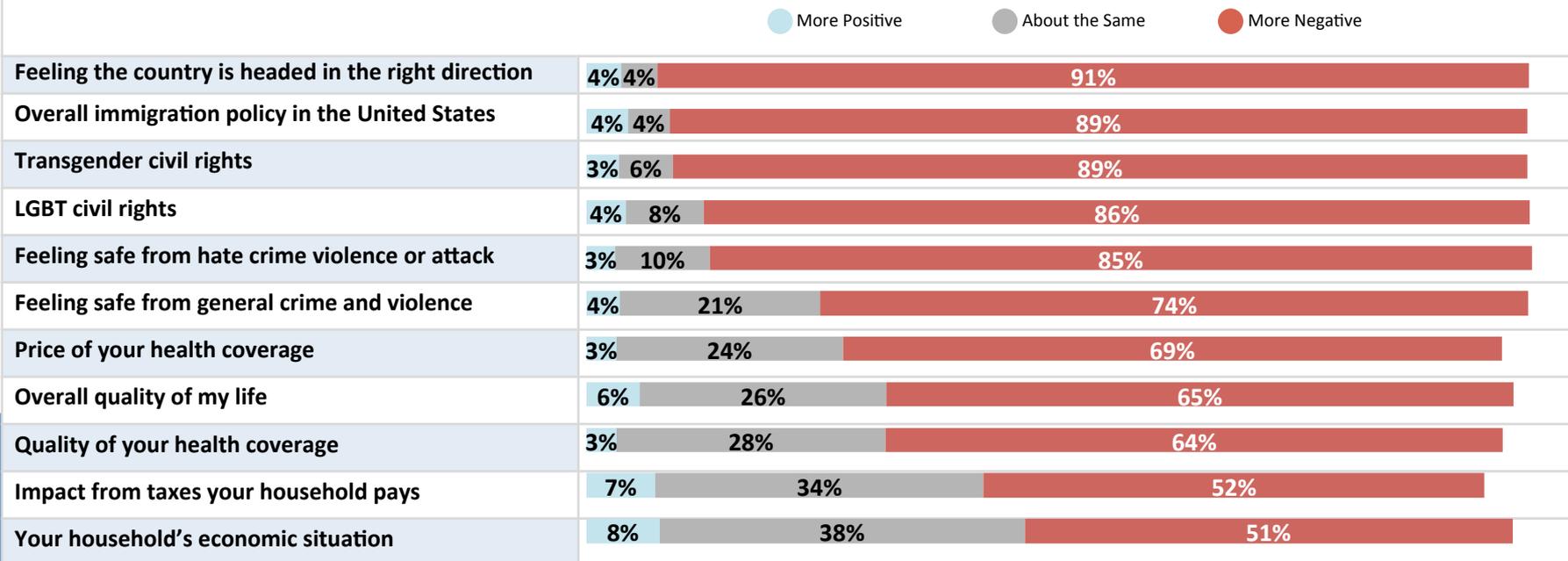
LGBT Rights, Safety, and Equality Statements: With the changing political environment in the United States, the LGBT community may feel less secure than it did in the recent past. More than 75% indicated that they fear the loss of LGBT civil rights recently gained, and the LGBT community expressed a desire to support companies that support LGBT equality.

Do you agree or disagree with these statements?
(% In Agreement)

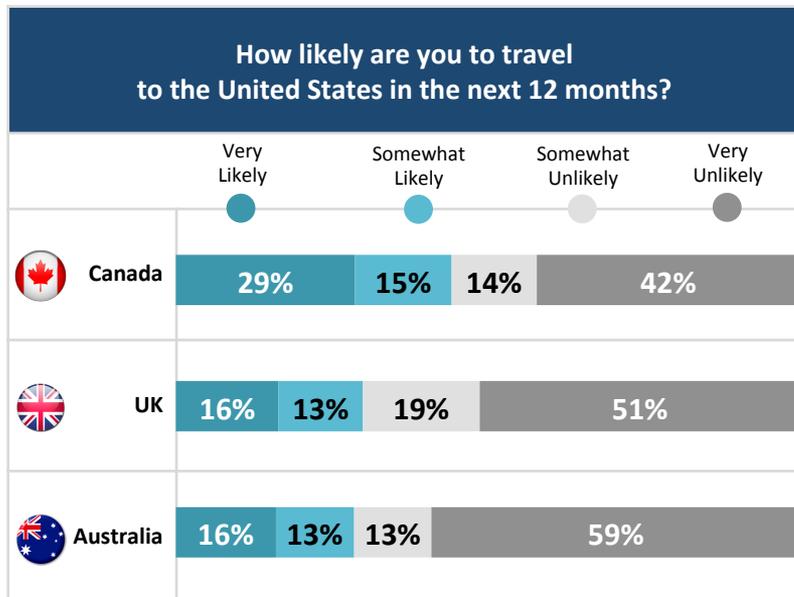


USA Social, Political & Economic Climate Forecast: Overall, LGBT community members are negative about the political and social direction of the country in every indicator tested.

In the following ways... Do you expect life to be more positive, more negative or about the same for your family and friends under President Trump, his cabinet appointments and the new Congress / Senate?



International Travel to the USA: With study participation from around the world, the survey gauged the implications of recent political changes for international travel to the United States. These two questions, fielded only to non-USA residents, yielded mixed results. On one hand the intention to travel to the United States was still reasonably high. However, among those not intending to visit, most cited political reasons for not visiting, vs. practicalities such as money or lack of time. CMI will revisit this question in 2018 to gauge actual travel to the U.S. among these international travelers.

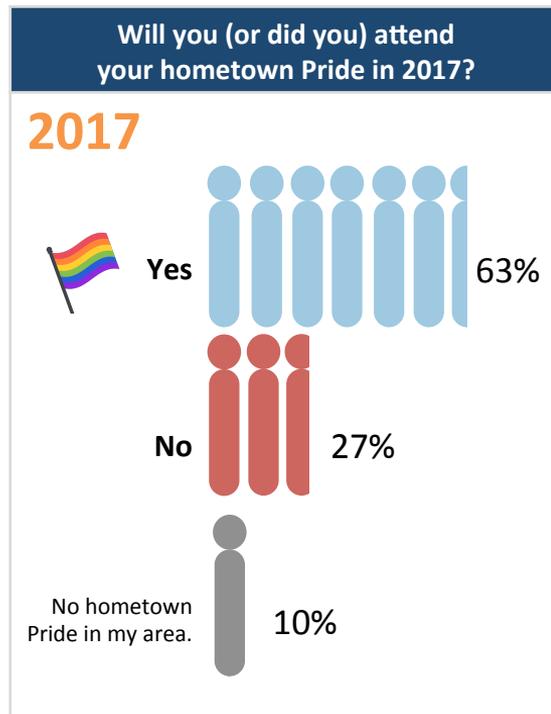
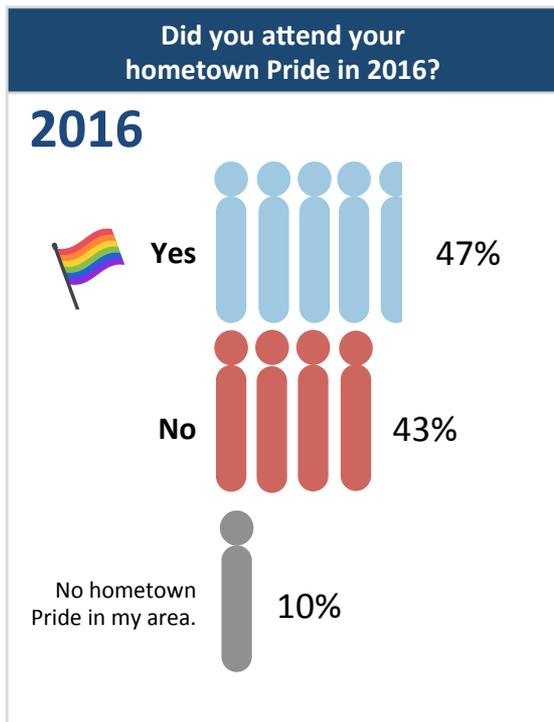


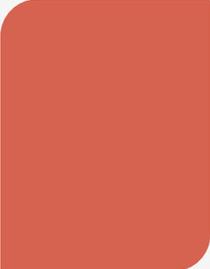
Why are you <u>unlikely</u> to travel the United States in the next 12 months? (Please mark all that apply.)	Country		
	Canada	UK	Australia
The policies of the new U.S. administration / President	79%	63%	65%
I don't feel welcome as an LGBT person	46%	35%	27%
Safety and security concern	38%	23%	28%
Heard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

Bases: Canada n=2,131; UK n=565; Australia n=288;

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

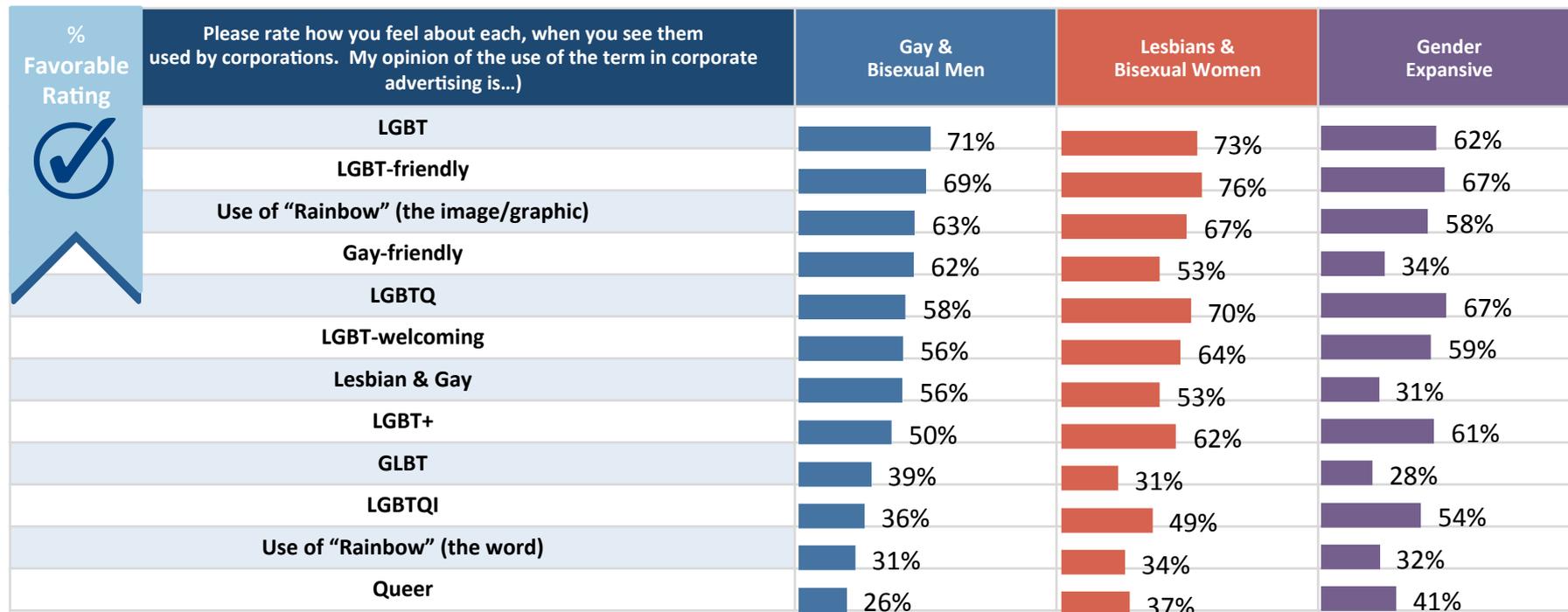
The Power of Pride: With recent political changes in the United States, Pride attendance should increase in the United States in 2017, compared to 2016. 63% of LGBT Americans surveyed said that they will attend (or already have attended) their hometown Pride in 2017. This is compared to 47% having attended their hometown Pride events last year, representing a 34% increase in interest and participation for 2017.





Terminology

Favorability of Terms: From a corporate marketing perspective, “LGBT” remains the most popular term to describe the community (and why CMI continues to use it in this report). “LGBTQ” gained significant positive response over the past year, especially among gay and bisexual men. CMI now views “LGBTQ” to be a positive word for corporations to use today, with little negative downside. CMI also noted that “LGBT-friendly” is far more popular than “gay-friendly,” which can now be seen as exclusionary of the L, B and T. The term GLBT has a below 40% favorability rating even among men, and CMI recommends that corporations stop using the term.



Participants were asked to rate each term as positive, neutral, or negative.

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

Favorability of Terms: The term “LGBT” is perceived favorably across all generations. However, for the first time “LGBTQ” is the preferred term among Millennials, and also for the first time, now has an over 50% approval rating for Baby Boomers. Also of note, is that the term “gay-friendly” now has a non-positive rating among Millennials, who prefer “LGBT-friendly.” The term “LGBT+” (the + sign representing all the other letters in this case) has also become more popular in the last year, especially among Millennials.

 % Favorable Rating	Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...)	Millennials+	Gen X	Boomers+
	LGBTQ	 72%	 64%	 56%
	LGBT-friendly	 72%	 72%	 71%
	LGBT	 70%	 72%	 72%
	LGBT+	 67%	 54%	 48%
	Use of “Rainbow” (the image/graphic)	 59%	 67%	 67%
	LGBT-welcoming	 57%	 60%	 63%
	LGBTQI	 51%	 42%	 37%
	Gay-friendly	 44%	 59%	 63%
	Lesbian & Gay	 41%	 56%	 61%
	Queer	 40%	 32%	 25%
	GLBT	 30%	 36%	 37%
	Use of “Rainbow” (the word)	 26%	 33%	 38%

Participants were asked to rate each term as positive, neutral, or negative.

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

LGBT vs. LGBTQ: One of the most common questions that CMI has received in the past few years is if corporations should move from addressing the community from “LGBT” to “LGBTQ.” Based on recent data, CMI believes that both can now be used safely. The advantages of “LGBT” is that the term is more favored by the overall community, has higher positive rates among Baby Boomers and the term is often perceived as being “safer” by corporations. This is why CMI continues to use LGBT in this report. However, “LGBTQ” has made significant gains in the past few years, has the most support among Millennials, and now has minimal negatives across any demographic group.

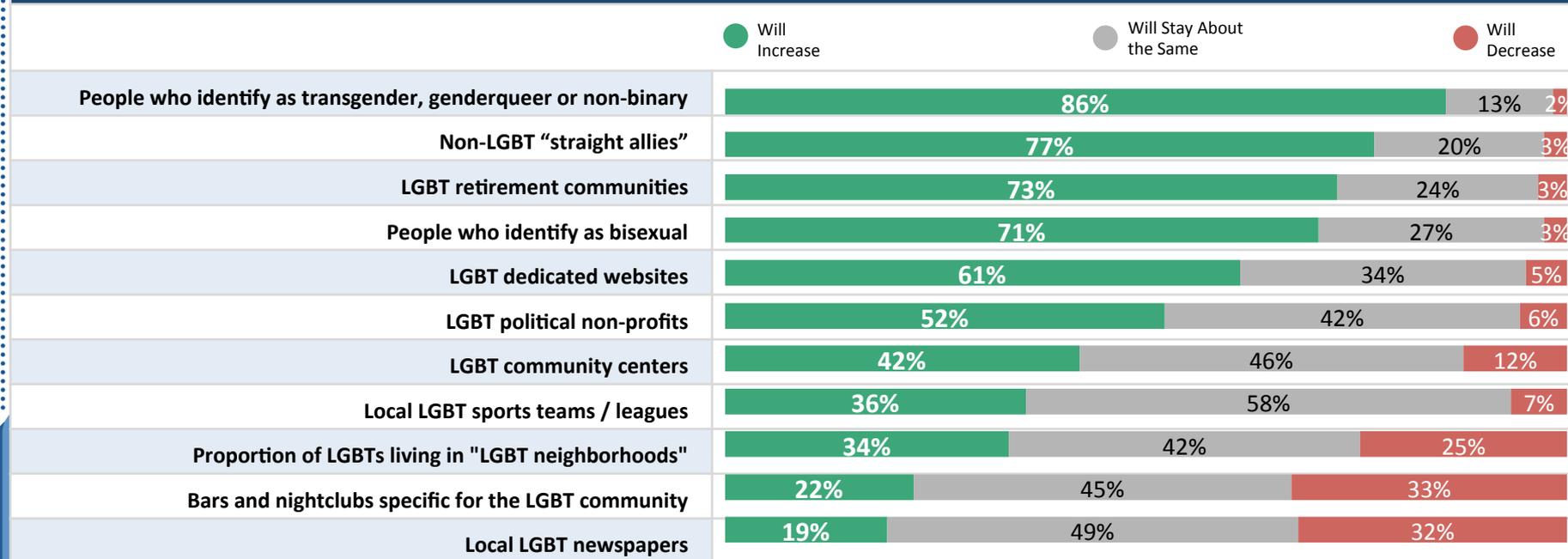
Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...)	LGBT			LGBTQ		
	Positive	Neutral	Negative	Positive	Neutral	Negative
ALL LGBT USA	71%	26%	3%	64%	29%	7%
All LGBT Canada	64%	33%	3%	62%	32%	6%
USA Gay & Bisexual Men	71%	26%	3%	58%	34%	9%
USA Lesbians & Bisexual Women	73%	25%	2%	70%	25%	5%
USA Gender Expansive	62%	34%	4%	67%	28%	4%
USA Millennials+	70%	27%	3%	72%	23%	5%
USA Generation X	72%	25%	3%	64%	29%	7%
USA Baby Boomers+	72%	26%	2%	56%	35%	8%



LGBT Media and Organizations

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

Do you think the following will have increased or decreased, 10 years from now?



LGBT Media Interaction (Past 12 Months): Similar to 2016, participants reported increases in digital interaction with LGBT media, while print media interactions are stable over the past year. LGBT dating app use was relatively stable, but some decreases were reported in use by older generations.

Has your interaction with LGBT media (newspapers, websites, etc.) changed over the past 12 months?		USA Gender Breakout			USA Generation Breakout		
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 Visiting LGBT websites / blogs	Increased	41%	40%	50%	49%	40%	37%
	Same	52%	51%	43%	44%	52%	57%
	Decreased	6%	8%	6%	7%	8%	6%
 Reading LGBT email newsletters	Increased	23%	27%	33%	26%	24%	27%
	Same	65%	63%	59%	64%	63%	64%
	Decreased	12%	10%	8%	10%	13%	9%
 Reading local LGBT newspapers and magazines	Increased	15%	19%	21%	20%	16%	15%
	Same	68%	69%	69%	69%	66%	70%
	Decreased	17%	13%	11%	11%	18%	15%
 Using LGBT dating mobile apps	Increased	22%	12%	16%	27%	14%	10%
	Same	52%	63%	62%	52%	59%	63%
	Decreased	26%	25%	22%	21%	27%	27%
 Reading LGBT national magazines	Increased	14%	14%	19%	18%	13%	12%
	Same	69%	73%	70%	72%	68%	72%
	Decreased	17%	13%	11%	10%	18%	15%
 Using LGBT (all other non-dating) mobile apps	Increased	13%	9%	14%	14%	11%	8%
	Same	68%	74%	71%	71%	70%	72%
	Decreased	19%	17%	15%	14%	19%	20%

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

LGBT Media Interaction (Past 30 Days)

In the past 30 days, have you read any of the following print media...? (Please mark all that apply.)	USA Gender Breakout			USA Generation Breakout		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
LGBT publications / newspapers for my city or region	47%	40%	44%	34%	46%	52%
LGBT national magazines	36%	26%	29%	24%	31%	36%

In the past 30 days, have you viewed or listened to any of the following...? (Please mark all that apply.)	USA Gender Breakout			USA Generation Breakout		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 LGBT websites / blogs	70%	62%	71%	72%	67%	59%
 LGBT email newsletters	41%	39%	50%	34%	41%	48%
 LGBT-dedicated YouTube channels	35%	24%	38%	43%	26%	22%
 LGBT mobile apps (dating or hook-up)	37%	9%	17%	32%	22%	14%
 LGBT-dedicated TV channels	30%	15%	17%	21%	24%	20%
 LGBT audio podcasts	14%	13%	19%	20%	14%	8%
 LGBT mobile apps (non-dating)	17%	8%	15%	14%	15%	10%
 LGBT radio (on the air or streaming online)	11%	8%	12%	8%	11%	10%
None of the above	13%	24%	15%	13%	19%	23%

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

Social Media Interaction (Past 30 Days)

Do you have, and have actively used (at least once a week), any of these social media and dating websites / apps in the past 30 days? (Please mark all that apply.)		USA Gender Breakout			USA Generation Breakout		
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
	Facebook	84%	87%	84%	91%	86%	79%
	YouTube	70%	64%	70%	74%	69%	59%
	Instagram	47%	45%	39%	65%	47%	24%
	Twitter	40%	39%	39%	46%	43%	29%
	LinkedIn	39%	35%	27%	36%	41%	32%
	Tumblr	43%	15%	30%	44%	27%	18%
	Snapchat	26%	25%	22%	53%	19%	5%
	Pinterest	18%	31%	22%	27%	27%	19%
	Google+	21%	21%	22%	14%	23%	26%
 Dating Social Media	Any dating app dedicated to gay men	44%		12%	*54%	*45%	*34%
	Any dating app for the general population (i.e. not LGBT-specific)	10%	9%	14%	19%	7%	4%
	Any dating app dedicated to lesbians		8%	6%	**14%	**5%	**5%
	None of the above	4%	6%	4%	1%	3%	10%

Flickr, Vine and Picasa had the poorest activity in the past 30 days among all segments (1%-5%).

*Among Gay Men ONLY.

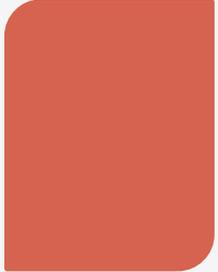
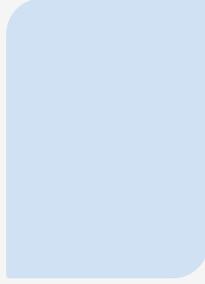
** Among Lesbians ONLY.

Bases: USA n=17,420; Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379

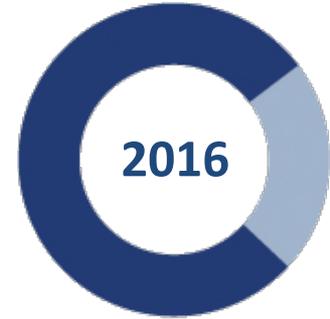
Other Types of LGBT Community Interactions (Past Year)

In the past 12 months, have you viewed or participated in any of the following? (Please mark all that apply.)	USA Gender Breakout			USA Generation Breakout		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 Watched an LGBT-inclusive TV show	74%	72%	67%	79%	74%	64%
 Watched a film with majority LGBT characters	73%	66%	61%	73%	71%	64%
 Visited a bar / nightclub for the LGBT community	59%	42%	43%	56%	53%	40%
 Donated to LGBT organization(s)	46%	44%	44%	36%	47%	52%
 Visited an neighborhood because it is LGBT-popular	42%	30%	29%	41%	38%	28%
 Attended an LGBT organization fund-raiser, gala, etc.	28%	26%	32%	23%	29%	32%
 Volunteered at LGBT organization(s)	20%	22%	34%	20%	23%	23%
 Attended an LGBT film festival	10%	10%	10%	7%	12%	12%
 Attended / participated in an LGBT sports activity	8%	6%	5%	8%	8%	5%
None of the above	7%	7%	9%	6%	6%	10%

Bases: Gay & Bisexual Men n=12,459; Lesbians & Bisexual Women n=3,616; Gender Expansive n=1,345; Millennials+ n=4,786; Gen X n=5,255; Boomers+ n=7,379



Appendix: Findings from CMI's 10th Annual LGBT Community Survey



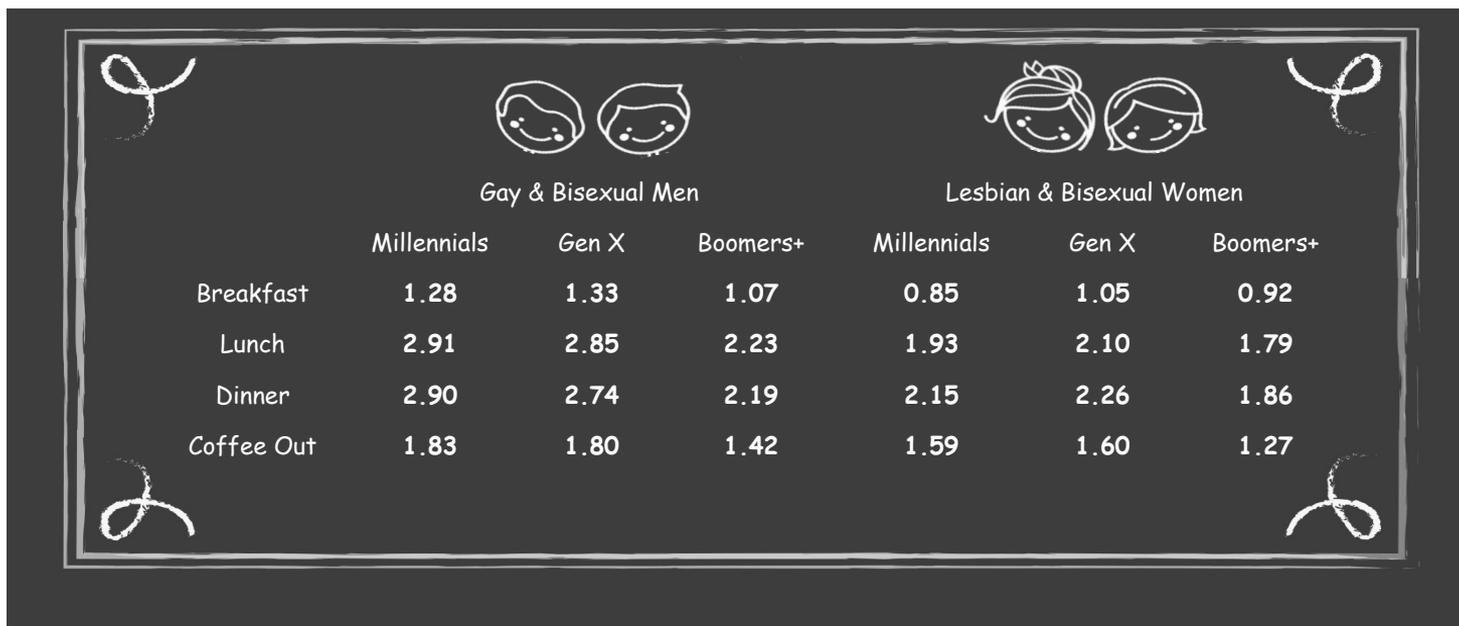
There are too many topics for the Annual LGBT Community Survey to ask every question every year. We're including some results from the previous year's survey report to help round out the data for our readers.

The results in this section are a review of 2016 data that CMI does not feel would have significantly changed in the past year. The methodology used in 2016 is similar to 2017.

Download the full 2016 report at
www.communitymarketinginc.com

Number of Meals Out: Gay and bisexual men eat more meals out compared to lesbian and bisexual women. Generational differences in the number of meals out are not substantive, but Millennials and Gen X eat meals out more often than do Baby Boomers.

In the past 7 days, how many meals did you eat out in the following categories?

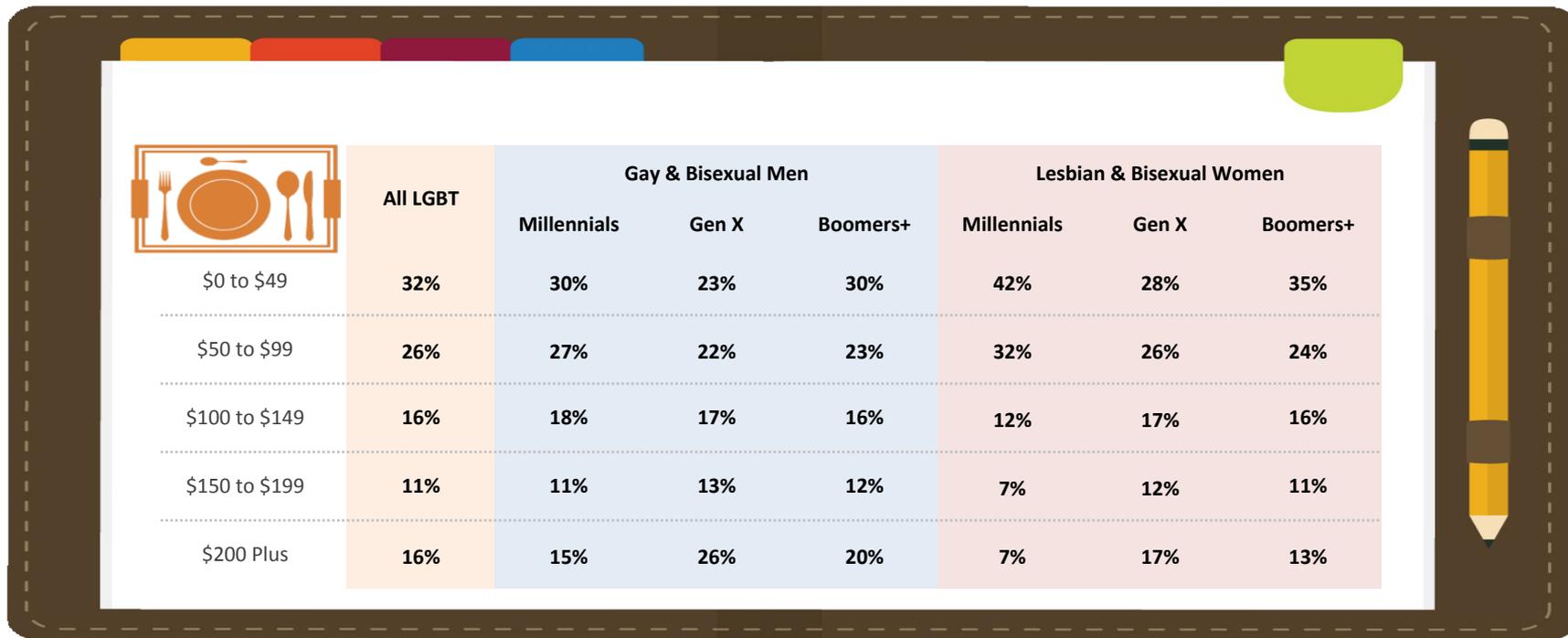


	Gay & Bisexual Men			Lesbian & Bisexual Women		
	Millennials	Gen X	Boomers+	Millennials	Gen X	Boomers+
Breakfast	1.28	1.33	1.07	0.85	1.05	0.92
Lunch	2.91	2.85	2.23	1.93	2.10	1.79
Dinner	2.90	2.74	2.19	2.15	2.26	1.86
Coffee Out	1.83	1.80	1.42	1.59	1.60	1.27

Base: Gay & Bisexual Men Millennials n=1,881; Generation X n=2,831; Boomers+ n=4,122;
Lesbian & Bisexual Women Millennials n=1,059; Generation X n=1,031; Boomers+ n=1,364

Restaurant Spending: Generation X and Baby Boomer gay and bisexual men report spending the most at restaurants, followed by Generation X lesbian and bisexual women.

How much have you spent on all meals and drinks at restaurants, fast food, cafes, etc. in the past 7 days? Include all personal funds spent, even if you paid for others. If someone else paid for a meal, do not include that amount.

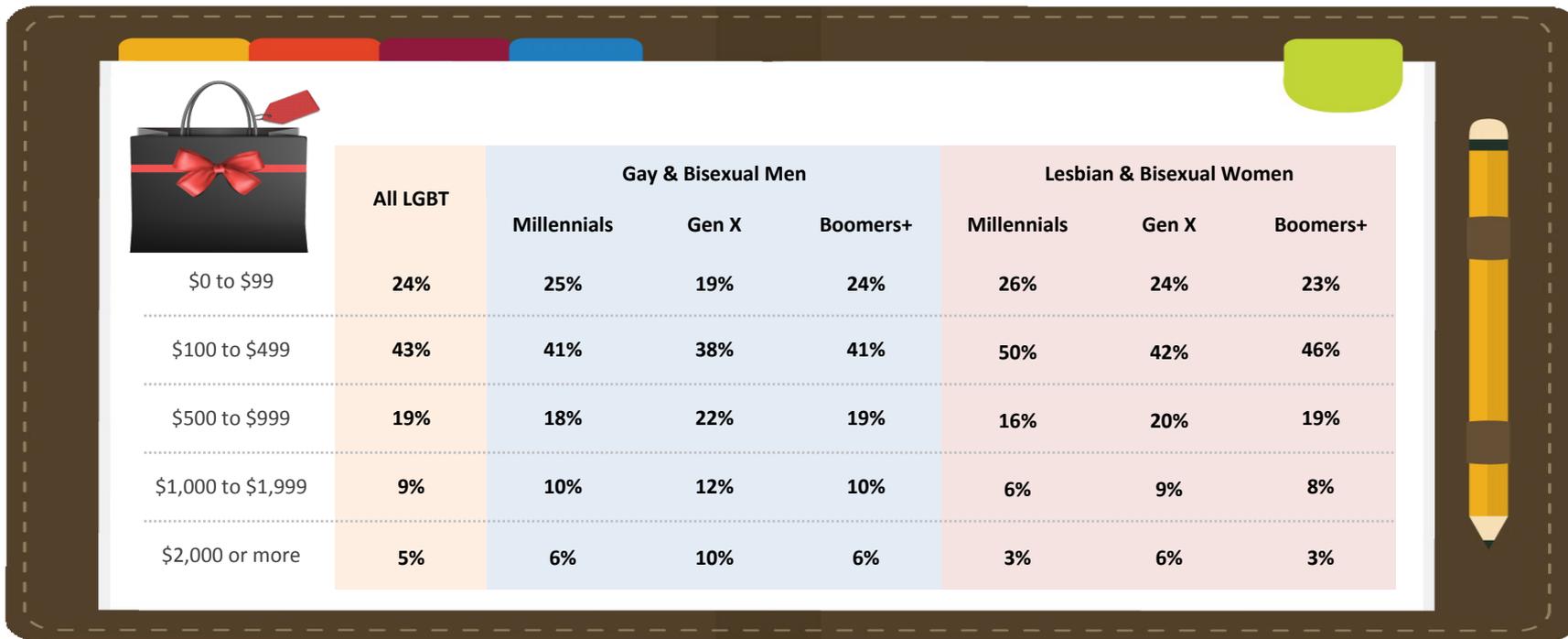


	All LGBT	Gay & Bisexual Men			Lesbian & Bisexual Women		
		Millennials	Gen X	Boomers+	Millennials	Gen X	Boomers+
\$0 to \$49	32%	30%	23%	30%	42%	28%	35%
\$50 to \$99	26%	27%	22%	23%	32%	26%	24%
\$100 to \$149	16%	18%	17%	16%	12%	17%	16%
\$150 to \$199	11%	11%	13%	12%	7%	12%	11%
\$200 Plus	16%	15%	26%	20%	7%	17%	13%

Base: All LGBT n=13,547; Gay & Bisexual Men Millennials n=1,881; Generation X n=2,831; Boomers+ n=4,122; Lesbian & Bisexual Women Millennials n=1,059; Generation X n=1,031; Boomers+ n=1,364

Clothing Purchases: Gay and bisexual men are more likely than lesbian and bisexual women to spend \$500 or more per year on clothing. Despite lower income levels, Millennials still report strong clothing purchase patterns.

In the past 12 months, about how much have you spent on new clothing for yourself?



Base: All LGBT n=13,547; Gay & Bisexual Men Millennials n=1,881; Generation X n=2,831; Boomers+ n=4,122;
Lesbian & Bisexual Women Millennials n=1,059; Generation X n=1,031; Boomers+ n=1,364

Access to LGBT Resources: Not surprisingly, LGBTs living in big cities have access to more LGBT-specific resources than do those living in smaller communities. For the first time, this study identified the size of the LGBT resource gap: 73% of those living in rural communities indicated that they have no access to *any* of the services listed.

Do you have access to any of these types of LGBT organizations in your city/community? Check all that exist in your community, to your knowledge.

	Urban / big city	Medium sized city	Suburb	Small city / small town	Rural area
LGBT community center	76%	57%	53%	30%	18%
LGBT professional or business organization	72%	49%	48%	26%	15%
LGBT sports organization	60%	33%	33%	13%	8%
LGBT arts organization	47%	25%	24%	11%	8%
LGBT-specific mental health organization	45%	22%	21%	11%	8%
Gay men's health organization (Among Gay & Bisexual Men)	60%	33%	32%	17%	9%
Lesbian or women's health organization (Among Lesbian & Bisexual Women)	37%	16%	17%	8%	4%
None of the above	10%	27%	32%	56%	73%

Base: Unweighted All LGBTs living in Urban/big city n=5,499 ; Medium sized city n=3,225;
Small city/small town n= 1,783; Suburb n=2,122 ; Rural area n=802

FOR MORE INFORMATION:

CMI's highly specialized services are based on 25 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 80,000 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.

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

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

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*Community Marketing, Inc. is an NGLCC
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Authorization to Reference Data from this Report

Permission to quote statistics from this report is granted, provided that credit is made as specified below:

“LGBT Community Survey® data was provided by Community Marketing & Insights, an LGBT-focused research firm based in San Francisco.”

Thank you.



ABOUT CMI'S LGBTQ RESEARCH PRACTICE

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

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

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

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

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



ABOUT THE CMI RESEARCH PANEL

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

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

CMI'S PANEL CONSISTS OF OVER 80,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:

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

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

- Over 20,000 lesbian and bisexual women
- Over 30,000 gay and bisexual men
- 3,000 transgender community members
- 7,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 18,000 representing LGBTQ communities of color
- 20,000 LGBTQ Millennials
- Thousands of men living with HIV (Note: All health-related data is maintained independent of personally identifying information)
- Participants in all 50 states with ZIP code-level geographic targeting capability
- 10,000 with a master's degree or better
- 4,000 LGBTQ parents with a child under 18 living at home
- 10,000 legally married same-sex couples
- Experience with LGBTQ youth research (in partnership with an institution and IRB approval)

CMI'S LGBTQ STRATEGIC PLANNING & CORPORATE TRAINING

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

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

LGBTQ Community Survey and Community Marketing are registered trademarks of Community Marketing, Inc.

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



CONTACT US

Visit www.CMI.info, email research@CommunityMarketingInc.com, or call +1 415-437-3800

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

LGBT Market Research:

There is a difference!

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

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

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

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

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

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

CMI'S QUANTITATIVE SURVEYS: SIZE DOES MATTER

CMI has conducted hundreds of LGBT-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market.

Size does matter when it comes to surveys. Our panel has grown to over 70,000 qualified LGBT consumers—the largest of its kind, by far. Our Annual LGBT Community Survey® study has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

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

Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or “reinvent the wheel” at your expense.

It's not possible to fathom the diversity and complexities within LGBT (see below) through a small sample. And with small samples, you lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Atlanta? Generalities and sweeping statements about “the LGBT market” based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.

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

Community Marketing & Insights emphasizes that there is no “gay market,” just as there is no single “Asian market.” The LGBT communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Add to that variations in geographical location, age, income, relationship status, gender identity and more, and it becomes essential to discover which opportunities within LGBT will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBT will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

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

GET A DEEPER UNDERSTANDING OF THE LGBT COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. Quantitative (data) research is important, but it's just one side of the coin. Our full range of research services uncover the rest of the story through qualitative research, most notably derived from focus groups.

We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany, Australia and China, as well as many other markets. Sometimes the same creative, tested in different regions, can yield different perspectives. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns?

CMI is the only LGBT-dedicated research provider that produces and facilitates qualitative research, including focus group studies (both in-person and online), in-depth interviews, online communities and advisory boards, which can round out a comprehensive market intelligence plan.

By producing online surveys only, other research companies are telling only half of the story...at best. Without actual consumer interaction, they cannot fathom the deeper insights hiding behind the bar graphs and pie charts. Nor can they adequately advise you on the sensitivities and complexities that can only be uncovered by qualitative research—extremely important considerations that averages and assumptions extrapolated from survey statistics are likely to miss.

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

Unlike many other firms, CMI will never sell or represent another research company's services. Nor will we outsource your projects and report on the results of a third party's work. Without being intimately involved in every aspect of a project—discussing client goals, designing the study, building and implementing the survey, and engaging directly with consumers in focus groups—it is difficult to gain the insights that we regularly deliver. CMI's hands-on LGBT research specialization spanning over two decades is unmatched.

VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBT market intelligence, however, and the cumulative 60+ years of LGBT-dedicated experience among the CMI team, we're able to keep your costs low. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 25 years.

At CMI, we're not running a large operation juggling many accounts and projects with varied focus. Our client dedication and LGBT market specialization delivers you superior intelligence at a fraction of the cost.

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

PROUDLY LGBT-OWNED AND -OPERATED

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

AND PROUD OF OUR COMMUNITY CITIZENSHIP

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

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

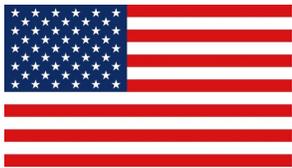
**LGBT Community Research Studies,
Strategic Consulting and Corporate Training**
since 1992

LGBTQ Panel 2017-2018

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with 25 years of dedicated experience conducting LGBTQ consumer surveys, focus groups, in-depth interviews, advisory boards, consulting services and training. We skillfully assist our clients with strategies, tactics and cost-effective plans based on research results and case study experience.

CMI's PANEL CONSISTS OF OVER 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 LGBT SEGMENT

20,000+
Lesbian and
bisexual women



30,000+
Gay and
bisexual men



3,000
Transgender
community
members



7,000
Bisexual
community
members



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



5,000 With an HHI
Below \$25,000



- Participants in all 50 states
- Zip code-level geographic targeting capability

Thousands of men living with HIV

Note: All health-related data is maintained independent of personally identifying information.



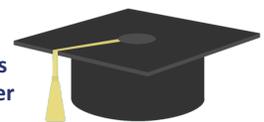
18,000
Representing
the LGBTQ
community
of color



20,000
LGBTQ
Millennials



10,000
With a master's
degree or higher



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



10,000
Legally married
same-sex couples



LGBTQ youth research
experience
(in partnership with an
institution and IRB approval)

