



CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

30 Years of LGBTQ Market Research





CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992



- California-based with global clients; founded in 1992.
- 100% LGBTQ-owned and -operated; NGLCC-Certified LGBTBE supplier.
- 30 years of consumer research; CMI has conducted hundreds of LGBTQ research initiatives across many industries.
- Dedicated research panel of 50,000+ LGBTQ consumers in North America.
- Online surveys, focus groups, virtual focus groups, in-depth interviews, intercepts and other methodologies.
- Serves corporate, university, organization and government institution clients throughout the USA, Canada, Europe, Asia, Latin America and Australia.



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Leaders in LGBTQ Research since 1992



Thomas Roth
President & Founder



David Paisley
Senior Research Director



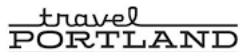
Lu Xun
Research Director

CMI Community Marketing & Insights

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Some of CMI's LGBTQ Research Clients

Finance • Brands • Tourism • Media • Non-Profits • Government • Universities



CMI Offers Many LGBTQ Research Report Downloads on www.CMI.info

LGBTQ Community Survey® June 2022



LGBTQ Consumer Products May 2020



Black LGBTQ Community Survey January 2021



LGBTQ Health Survey Report March 2019



COVID-19 and LGBTQ Travel May 2020



LGBTQ Auto Ownership March 2020





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

16th Annual LGBTQ Community Survey[®]

USA Report | June 2022

Partners & Sponsors:



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CMI's 16th ANNUAL LGBTQ COMMUNITY SURVEY RESEARCH PARTNERS

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

Thank You
to our partners

In Partnership With

Rivendell

The LGBT & HIV Media Company!

Special Thanks to Our
Translation Partner!



#ILoveGay
A&U Magazine/ART & Understanding
Adelante Magazine
Atlanta Pride Committee
Autostraddle.com
Bay Area Reporter
Bay Windows
Betty's List
Between The Lines
Camara de Comerciantes LGBT de Colombia
CAMP Rehoboth
Cancer Health
Center for Black Equity
CenterLink: The Community of LGBTQ Centers
Chicago Pride
ChicagoPride.com
Circle of Voices
CityXtra Magazine
Connect: Inspire. Empower.Change.
Curve Magazine
Dallas Voice
Damron Travel Guides
DECORHOMME
Desert Business Association, the Desert's LGBTQ Chamber
Desert Daily Guide / DDG Media Group
Embrace Magazine
EqualityMD
Equally Wed
Erie Gay News
Fenuxe Magazine
FUGUES
Fun Travel Guides
Gay City News
Gay Island Guide
GayCalgary Magazine
GayCities
GayDesertGuide.LGBT
Gayvan.com Travel Marketing
GBSA (Washington / Seattle)

GED MAGAZINE
Georgia Voice
GFLGLCC | Greater Fort Lauderdale LGBT Chamber of Commerce
Golden Gate Business Association
Goliath Magazine
GoPride Networks
Greater Houston LGBT Chamber of Commerce
Harlem Pride
Hawaii LGBT Legacy Foundation
Hep
Hotspots Magazine
Instinct Magazine
Jansi
Jax Gay
KGAY Palm Springs
Lambda Business Association
Las Vegas PRIDE
las Vegas Spectrum
Lesbian.com
Letters from CAMP Rehoboth
LGBTQ Nation
Los Angeles Blade
Louisville Pride Foundation
Metro Weekly
METROSOURCE
Miami Dade Gay and Lesbian Chamber of Commerce
Mirror Magazine
Motor City Pride
Muskoka Pride
Nashville LGBT Chamber
National Queer Asian Pacific Islander Alliance
New Jersey LGBT Chamber of Commerce
New Mexico Out Business Alliance
North Texas LGBT Chamber of Commerce
OMG.BLOG
ONE Community (Arizona)
OUT FRONT Magazine (Colorado)
OUT Georgia Business Alliance
Out In Jersey Magazine

Out Professionals
OutClique Magazine
OutSmart Magazine (Houston)
Outword Sacramento
PASSPORT Magazine
Peach Magazine
Persad Center (Pittsburgh)
Philadelphia Gay News
Pink Media
POZ
Pride Guide® USA
Pridesource.com
Q Voice News
QLife
Qnotes / QnotesCarolinas.com
QSaltLake Magazine
Queerty
QVegas
Rainbow Chamber of Silicon Valley
Rainbow GUIDE Arc-en-ciel
Real Health
Sacramento Rainbow Chamber of Commerce
San Francisco Bay Times
Seattle Gay News (SGN)
South Florida Gay News
Squirt.org
Tagg Magazine
TransPonder
Tu Salud
Two Bad Tourists
United Seattle
Utah LGBTQ+ Chamber of Commerce
Washington Blade
Watermark (Florida)
We Were There Inc
Windy City Times
Wisconsin LGBT Chamber of Commerce
Xtra: LGBTQ2S+ Culture, Politics and Health



ABOUT CMI's 16th ANNUAL LGBTQ COMMUNITY SURVEY • METHODOLOGY & ASSUMPTIONS

USA Report

Completes n=14,843 participants

Fielded to CMI's LGBTQ research panel and via 100+ LGBTQ media, events and organizations

All 50 states, Washington DC and Puerto Rico are represented in the results.

Results are representational of LGBTQ community members who interact with LGBTQ media, events, and organizations. This report is designed to help inform organizations that outreach to the community through LGBTQ media, events, and sponsorships.

The survey was fielded in English, Spanish, and French.

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

Fielded April 1, 2022 to May 31, 2022

Results Weighted by Gender Identity

Cisgender Gay & Bi+ Men	44%
Cisgender Lesbian & Bi+ Women	44%
Transgender & Non-Binary Participants	12%

Results Weighted by Age Group

Age 18-34	30%
Age 35-54	35%
Age 55 or over	35%

Results Weighted by Race/Ethnicity

Asian or Pacific Islander	7%
Black or African American	13%
Latino, Latina, Latinx or Hispanic	15%
White, Non-Hispanic	62%
Other Race or Ethnicity	3%



In LGBTQ Consumers: How are we the same? How are we different?



***LGBTQ is part
of diversity.***

In LGBTQ Consumers: How are we the same? How are we different?



***LGBTQ is part
of diversity.***

***Diversity is
part of LGBTQ.***

The LGBTQ Community is Diversifying Over Time

LGBTQ diversity and ethnic intersectionality present market share growth opportunities.

Gay & Lesbian



GLBT



LGBT



LGBTQ



LGBTQ+

LGBTQIA+

LGBTQ2+



???

- Lesbian or Gay Woman
- Gay man
- Bisexual woman
- Bisexual man
- Pansexual
- Asexual
- Non-binary sexual orientation
- Same Gender Loving
- Heterosexual / Straight man
- Heterosexual / Straight woman
- Questioning
- Other: Please tell us
- Female
- Male
- Transgender
- Transsexual
- Trans Man
- Trans Woman
- Intersex
- Non-binary gender identity
- Genderqueer
- Gender Fluid
- Agender
- Questioning
- Other: Please tell us
- Queer
- Straight Ally
- Other: Please tell us



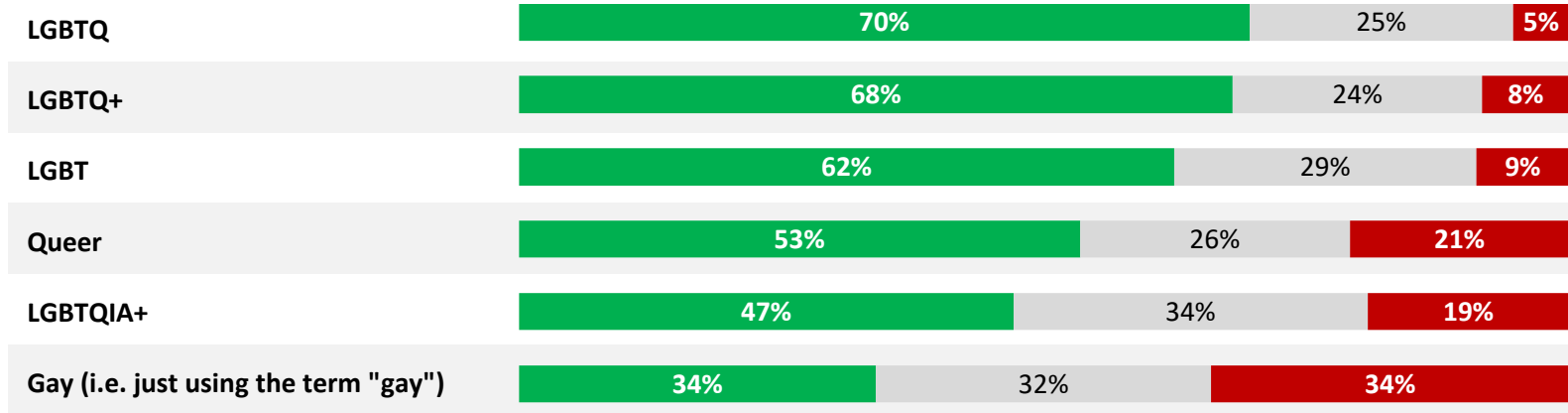
Terminology Within the LGBTQ Community

This year LGBTQ and LGBTQ+ are virtually tied as preferred terms, with the momentum continuing to shift to LGBTQ+

Q: The following terms are often used to describe our community. Please rate how you feel about each, when you see them used by corporations, non-profits, or in the media. To simplify the question, not all terms or letter combinations are used below.

My opinion of the use of the terms...




- Favorable
- Neutral
- Unfavorable

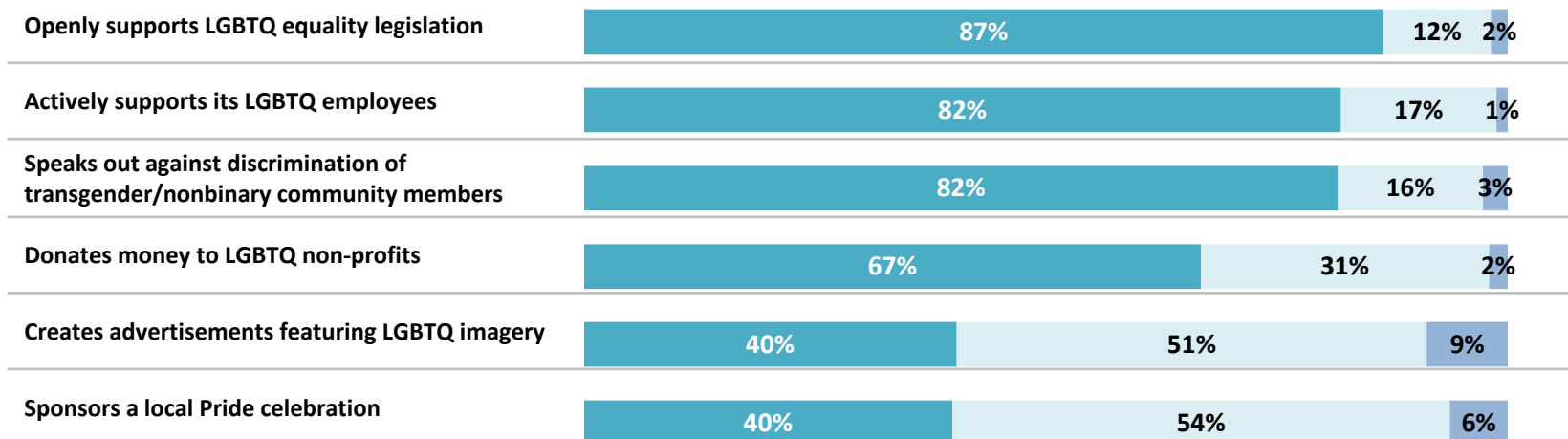


All LGBTQ n=14,843
See methodology for segment bases.

Perceptions of Supportive Activities

Q: Below are activities often used by companies to show support for the LGBTQ community. Which of these activities best demonstrate to you that the company supports the LGBTQ community? Please check the level of support.

-  Shows Strong Support
-  Shows Some Support
-  Shows No Support



For the purposes of LGBTQ market research and communications...

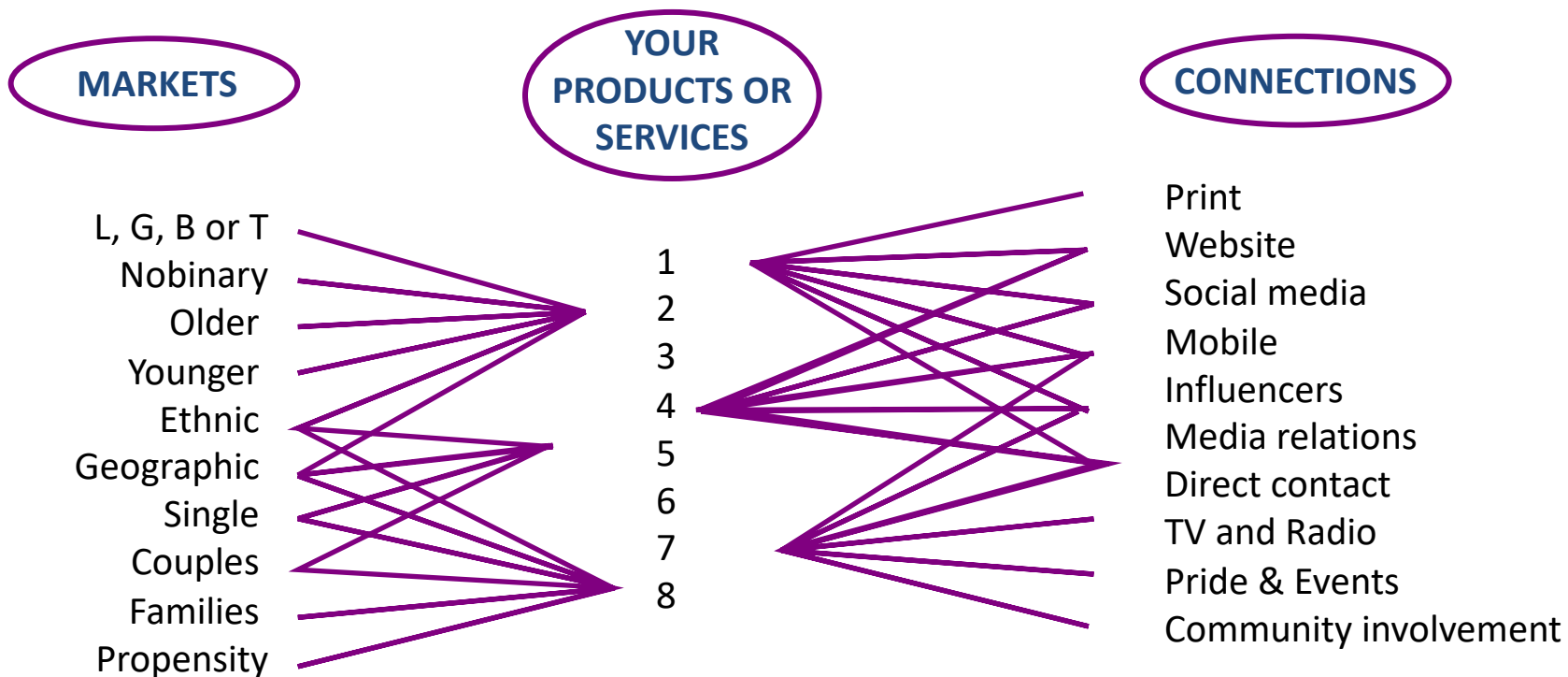
There is no singular “LGBTQ Market.”

Opportunities need to be assessed, evaluated and measured across these and other demographics:

- *Gender identity*
- *Sexual orientation*
- *Generation*
- *Race/ethnicity*
- *Location/state/metro area/type of community*
- *Relationship status*



R&D: Discover and develop your best-matched opportunities.



CMI's *Differentiated* LGBTQ R&D Solutions

- **Quantitative: USA and/or Canada LGBTQ market studies**
 - Establish baselines; gauge success
 - Identify best prospects and matched communications channels
 - Inform creative, messaging, offers
- **Qualitative: Virtual focus groups and interviews in key demographics**
 - The meaning behind the data: Motivations, aspirations, experiences
 - R&D: Know before you go to market
 - Product development: Match products or services to LGBTQ market segments
 - Test communications concepts: Ads, social, influencers, imagery, sponsorships, events,
- **Corporate training: Activating the research**
 - Gain buy-in and support across brands/business unit leadership
 - Encourage participation and engagement in programming



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Thomas Roth, President
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@LGBTQInsights

LGBTQ Market Research:

There is a difference!

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

Community Marketing & Insights (CMI) leverages our own proprietary panel to generate the valid, community-representative data that our clients depend on. As an LGBTQ-founded, owned and operated company, we understand the LGBTQ community's unique life experience. And because we have been serving clients for over two decades and have conducted over 300 LGBTQ-specific research projects, we have the professional experience needed to deliver actionable results and recommendations.

CMI'S PROPRIETARY PANEL

Community Marketing & Insights (CMI) has recruited for our proprietary research panel over the past 30 years by partnering with over 300 LGBTQ media, organizations, events, social media and influencers throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is highly representative of LGBTQ consumers who interact with LGBTQ community organizations and media. Our panelists come from diverse sources, allowing for broad LGBTQ research projects or targeted segments within LGBTQ.

CMI research is trusted by—and frequently quoted in—*New York Times*, *USA Today*, *Wall Street Journal*, *Forbes*, *Newsweek*, *U.S. News & World Report*, *Los Angeles Times*, *Chicago Tribune*, *Miami Herald*, *Ad Week*, *Christian Science Monitor*, NPR, CBS News, CNN, eMarketer, Mashable, Reuters, Associated Press and many others. CMI's research is considered the definitive resource for insights into the LGBTQ community.

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

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

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

CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS

CMI has conducted hundreds of LGBTQ-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market. Size does matter when it comes to surveys. Our panel has grown to 50,000 qualified and active LGBTQ consumers—the largest of its kind, by far. Our Annual LGBTQ Community Survey® study (now in our 16th year) has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Note: Without access to this enormous resource of qualified LGBTQ consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or “reinvent the wheel” at your expense. It's not possible to fathom the diversity and complexities within LGBTQ (see below) through a small sample. CMI fields surveys of 1,000+ responses. You might see some research with small samples, but they miss the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make an assumption that a Millennial lesbian techie couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay retiree in Miami? Generalities and sweeping statements about “the LGBTQ market” based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.

GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH

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

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 and Canada. Sometimes the same creative, tested in different regions, may yield different perspectives. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns?

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

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

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

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

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

VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBTQ market intelligence, however, and the cumulative 70+ years of LGBTQ-dedicated experience among the CMI team, we're able to keep your costs within budget. 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 30 years.

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

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

CMI is involved in the LGBTQ community: We volunteer time, donate resources and raise funds for numerous community-based organizations. We also participate in leading business and advocacy organizations, events and conferences within the community, such as Out & Equal, HRC, National LGBT Chamber of Commerce, GLAAD, NCLR and the International LGBTQ 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.



CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

LGBTQ Research Panel

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with over 30 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 49,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



44,000
LGBTQ Panelists
in the USA



5,000
LGBTQ Panelists
in Canada
(English + French Speaking)



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

15,000
Lesbian and
Bi+ Women



24,000
Gay and
Bi+ Men



Participants in all 50 states
Including rural communities

5,000
Transgender
and Non-binary
Community
Members



7,000
Bisexual and
Pansexual
Community
Members



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



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

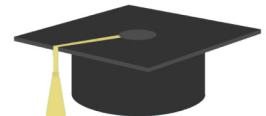
35%
Representing
LGBTQ
Communities
of Color



33%
Under Age
35



50%
With a BA or
Higher



10%
LGBTQ Parents with
a Child Under 18
Living at Home



20%
Legally Married



**LGBTQ Youth Research
Experience**
(in partnership with an
institution and IRB approval)



FOR MORE INFORMATION ON CMI'S LGBTQ RESEARCH CAPABILITIES, PLEASE VISIT WWW.CMI.INFO
CONTACT THOMAS ROTH at tom@cmi.info or call +1 (415) 343-4656

LGBTQ Research and Corporate Training

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

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

Certificate Number: 10013
Expiration Date: 03/31/2024
Renewal required by date above



The National LGBT Chamber of Commerce

Hereby Recognizes:

Community Marketing & Insights

As a Certified LGBT Business Enterprise™

(LGBTBE)



Justin G. Nelson
Co-Founder & President



Chance E. Mitchell
Co-Founder & CEO

nglcc 
Certified LGBTBE