14ᵗʰ Annual LGBTQ Community Survey®

USA Summary Report | June 2020

Sponsored by: WELLS FARGO Google

ABOUT CMI: 25+ YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has been conducting LGBTQ consumer research for over 25 years. Our practice includes online surveys, in-depth interviews, on-site focus groups, virtual focus groups, and LGBTQ recruitment assistance to university and government LGBTQ research initiatives. CMI maintains our own panel of 50,000 LGBTQ research participants. Our work is worldwide, with an emphasis on the United States, Canada, Mexico, China and Japan. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning, and assessment of return on investment.

CMI's research clients include leaders from a wide range of industries. CMI studies have been produced for these and many other clients: AARP, Freddie Mac, AT&T, Wells Fargo Bank, Absolut Vodka, Aetna Insurance, Google, New York Life, UPS, DIRECTV, Target Brands, T. Rowe Price, Johnson & Johnson, WNBA, Hallmark, Greater Fort Lauderdale Convention & Visitors Bureau, Las Vegas Convention & Visitors Authority, NYC & Company, Argentina Tourism Office, Visit Britain, Hawai'i Tourism Authority, U.S. Census Bureau, U.S. Housing & Urban Development, American Cancer Society, Planned Parenthood, Kaiser Family Foundation, and numerous other corporations and organizations across North America and around the world.

ABOUT CMI's 14th ANNUAL LGBTQ COMMUNITY SURVEY
METHODOLOGY & ASSUMPTIONS

INVITATION TO PARTICIPATE

Approximately 150 global study partners participated in recruiting LGBTQ community members to complete the survey. Partners include LGBTQ media, events, and organizations. A full list is presented on slides 6 and 7. Partners used a combination of print ads, digital ads, apps, membership email broadcasts, influencers, blogs, and social media for recruitment.

GLOBAL SURVEY RESPONDENTS

Over **34,000** respondents across the globe participated in the 2020 survey, which was fielded in English, Spanish, French, and Hungarian.

USA RESPONDENTS OVERALL

This report focuses on the **U.S. data** for **12,041** self-identified cisgender gay and bi+ men, **3,461** cisgender lesbian and bi+ women, and **1,728** transgender and non-binary community members. This is a total of **17,230** USA participants aged 18 to 75+.

HIGHLIGHTS FROM CMI's 13th ANNUAL LGBTQ COMMUNITY SURVEY

This report contains additional slides featuring highlights from our 13th annual report. Some of the questions are asked every other year, so selected results from 2019 are provided.

CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992   3

ABOUT CMI's 14th ANNUAL LGBTQ COMMUNITY SURVEY
METHODOLOGY & ASSUMPTIONS

IDENTITY

The Community Marketing & Insights (CMI) Annual LGBTQ Community Survey® allows participants to self-identify with a broad and inclusive spectrum of identities across the LGBTQ community. The survey allows participants to select *all that apply* for multiple gender identities, sexual orientations, and community identities. For example, a participant may identify as a transgender straight woman, or as a cisgender bisexual queer man, or a lesbian woman or any combination that the participant feels comfortable with.

RECRUITMENT SOURCES

USA survey respondents are recruited through CMI's proprietary LGBTQ research panel (28% of all participants), and through our partnerships with about 150 global LGBTQ media, events, and organizations (72% of participants). Because CMI has little control over partner sample or response, we do not profess that the results are representative of the "entire LGBTQ community." Instead, these results are a large sample of LGBTQ community members who interact with hundreds of LGBTQ media, organizations, and events. CMI views these results as most helpful to marketers and organizations that want to reach the community through LGBTQ advertising, marketing and/or sponsorship outreach. Because study partners do not attract LGBTQs in proportional gender and generational ratios, the report presents the data by demographic segments. Statistics presented in the report have been weighted, and divided into nine cohorts based on their gender identity and generation. That said, regardless of the lack of full control of the sample and varying partners year-to-year, results remain remarkably consistent on multi-year tracking questions, which is most likely due to the large sample size and like-minded outreach partners.

SEGMENTATION & WEIGHTING

Identity data presented includes cisgender gay and bi+ men, cisgender lesbian and bi+ women, and gender-expansive (transgender and non-binary participants). Generations reported include Millennials+ (born 1981-2002), Generation X (born 1965-1980), and Baby Boomers+ (born 1942-1964). The presentation of findings from the three identities and the three generations produces the nine sub-groups. Often, data is presented by demographic group, as CMI emphasizes that gender identity and generation distinctions are often more informative than "*all LGBTQ*" results. When the report does present an "all LGBTQ" result, it is based on two broad weighting assumptions: (1) Each of the three major adult generations are equally weighted; (2) Cisgender gay and bi+ men makeup 45% of the community, cisgender lesbian and bi+ women make up 45% of the community, and those with gender-expansive identities make up 10% of the community. CMI allocated these percentages in an effort to balance the perspectives by gender and generation. The survey's gender-expansive category includes participants who identify as transgender, trans men, trans women, genderqueer, gender fluid, non-binary, two spirit, agender, gender non-conforming and/or intersex. CMI acknowledges that the bisexual/pansexual participants in our survey do not represent the entire bi+ population. They represent bisexual people who are being reached through, and who are engaged with, LGBTQ media, events, and organizations. Because of the recruitment sources, results often do not show substantive differences between cisgender gay vs. bi+ men, or cisgender lesbian vs. bi+ women, which is the reason that we combine these participants into gay/bi+ man and lesbian/bi+ woman categories.

ABOUT CMI's 14th ANNUAL LGBTQ COMMUNITY SURVEY • METHODOLOGY & ASSUMPTIONS

USA Report

Completes n=17,230 participants

All 50 states represented
- **28% from CMI panel**
- **72% from about 150 participating LGBTQ media and organization partners**

> **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, French, and Hungarian.**

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

Results Weighted by Identity

Cisgender Gay & Bi+ Men	45%
Cisgender Lesbian & Bi+ Women	45%
Transgender & Non-Binary Participants	10%

Results Weighted by Generation

Millennials+ (1981-2002)	33%
Generation X (1965-1980)	33%
Baby Boomers+ (1942-1964)	33%

Participation by Month

March 14 to 31, 2020	12%
April 1 to 30, 2020	52%
May 1 to 31, 2020	36%

> The survey was fielded during an especially tumultuous time in USA history, which most likely affected results. For this year, understanding when participants took the survey matters more than in other years.

CMI's 14th ANNUAL LGBTQ COMMUNITY SURVEY • RESEARCH PARTNERS (1/2)

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

ADELANTE MAGAZINE	Dallas Voice | OUT North Texas	GED Magazine
A&U Magazine	Damron Company	Georgia Voice
ABQ LGBTQ+ Chamber of Commerce	DecorHomme	GFLGLCC | Greater Fort Lauderdale LGBT
Atlanta Pride Committee	Delta Foundation of Pittsburgh	Chamber of Commerce
Autostraddle	Desert Daily Guide	GLBT Historical Society
Avalon Media LLC - CURVE Magazine	EnGAYged Weddings	GoGuide Magazine
Baltimore OUTloud	Equally Wed	GoPride Networks; ChicagoPride.com
Bay Area Reporter	Erie Gay News	GPSGAY
Bear World Media	EveryQueer Magazine	Grab Magazine
Betty's List / San Francisco Bay Times	Fairness Campaign	GSBA / Travel Out Seattle
Between The Lines Newspaper	Focus Mid-South Magazine	Guide Arc en Ciel Quebec Rainbow Guide
Bisexual Queer Alliance Chicago	Fort Wayne Pride	Guts NYC LLC
Blue Ridge Pride Center, Inc.	FTM Magazine	Hampton Roads Business OutReach
boiMAGazine Chicago	Fugues	Harlem Pride
Boston Pride	Fun Travel Guides	Hawaii LGBT Legacy Foundation
Canadian Gay and Lesbian Chamber of	Gay City News	Hep
Commerce	Gay Desert Guide	Hotspots Media Group
Center For Black Equity	Gay For Good	Humen Media Group
CENTERLINK	Gayborhood	ImageOut: The Rochester LGBTQ Film
Circle of Voices Inc.	GayCalgary	Festival
cityXtra Magazine	GayCities	In Our Own Voices, Inc.
Colombian LGBT Chamber of Commerce	GayRVA	Infolettre de Fugues
Connecticut Gay and Lesbian Chamber of	Gays With Kids	Inside Out Film Festival
Commerce	Gayvan.com Travel Marketing	InterPride

In partnership with

Rivendell
The LGBT & HIV Media Company!

Special Thanks to Our Translation Partners!

humen media group

fugues   güjde DécorHomme   ZiP
AU SERVICE DES COMMUNAUTÉS GLBT DEPUIS 1984

PROJECT OUT
LIFE-SAVING. GENDER AFFIRMING. ERADICATING BIAS. EVERY DAY.

The Rainbow Times
NEW ENGLAND'S LARGEST LGBTQ NEWSPAPER SINCE 2006

CMI's 14th ANNUAL LGBTQ COMMUNITY SURVEY • RESEARCH PARTNERS (2/2)

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

Lambda Business Association	OutSmart Media Company	Rainbow Chamber Silicon Valley
Las Vegas PRIDE	OutWire757.com	Raynbow Affair Magazine
Las Vegas Spectrum	Peach ATL Media	Rhode Island Pride
Lesbian Nation LLC - AfterEllen.com	Philadelphia Gay News	San Diego Pride
Lesbian.com	Pink Media	SEAGLA
LGBT+ Center Orlando, Inc.	Pink Spots LGBTQ Resource Guides	Smart + Strong
LGBTQ Nation	Plexus LGBT + Allied Chamber of Commerce	SOULE
Los Angeles Blade	POZ	South Florida Gay News & Mirror Magazine
Love Inc. Magazine	Pride Center of the Capital Region	Squirt.org
Metro Weekly	Pride Guide® USA	Tagg Magazine
Metrosource	Pride Journeys	The Gayly
Miami-Dade Gay & Lesbian Chamber of Commerce	Pride St. Charles	The G-Listed
Modern Spin Media	Pridezillas LLC	The LGBT Community Center of the Desert
Muskoka Pride	PRIZM Magazine	The Rainbow Times
Nashville LGBT Chamber	Project MORE Foundation	The Sacramento LGBT Community Center
Navigaytour	Project Q Atlanta / Q Magazine	The Seattle Lesbian
New Jersey LGBT Chamber Of Commerce	PROUD FM 1039	therepubliq.com
NQAPIA - National Queer Asian Pacific Islander Alliance	Q Magazine (Australia)	Trans*Ponder
OMG.BLOG	Q Magazine (Key West)	Unity Coalition|Coalicion Unida, Inc.
One Colorado	Q Virginia	VIP Media
ONE Community	Q Voice News	Washington Blade
Out & About Nashville, Inc.	QLife Media	Watermark Publishing Group
OUT Georgia Business Alliance	QNotes / goqnotes.com	Windy City Times
Out In Jersey Inc	Queerty	Wisconsin LGBT Chamber of Commerce
Out Professionals	RAGE MONTHLY MAGAZINE	Xtra
OUTshine LGBTQ+ Film Festival	Rainbow Center (Tacoma, WA)	

ES

Executive Summary

Executive Summary

Key findings of the Community Marketing & Insights (CMI) 14th Annual LGBTQ Community Survey®

LGBTQ Community and Corporate Support

The LGBTQ community values the support of corporate partners, and corporate support makes a difference in LGBTQ purchasing decisions:

- 85% agree: Corporations that support LGBTQ equality are more important than ever.
- 80% agree: Companies that support LGBTQ equality "will get more of my business this year."
- 73% have made a conscious decision to make a purchase over the past 12 months, at least partially due to a company's LGBTQ-inclusive outreach, employment practices, or LGBTQ-supportive political stance.

Concerned About Many Issues Facing America

Corporations should not assume that LGBTQ equality is the only issue important to the community. Especially in a tumultuous 2020, the research identifies that the five most important issues facing the LGBTQ community are: LGBTQ equality, health care quality and cost, fair elections/protection of democracy, racial discrimination and ability to respond to the COVID-19 pandemic.

Voting Motivations by Segments Within LGBTQ

There are demographic differences by gender identity, generation, and race/ethnicity in voting motivations. For example, on the importance of racial discrimination, there was a 13% difference between Black participants (90%) and White participants (83%). Fighting for transgender rights was important to 93% of transgender and non-binary participants vs. 60% of gay & bi+ men. 90% of Baby Boomers were concerned about Supreme Court appointments, compared to 71% of Millennials. While it might be expected that some issues are more important to different communities within LGBTQ, this is also a time that the community as a whole must be fighting for each other's rights.

Corporations Must Communicate Their Support

CMI research has found that sponsorship of LGBTQ community organizations, as well as taking a stand for LGBTQ human rights, are key approaches to establishing a brand as an authentic LGBTQ partner. This report also confirms that it takes more than doing the "right thing" to make an impact. Marketers also need to communicate their efforts to the community through LGBTQ media channels. Otherwise, a corporation's good deeds can go unrecognized.

Executive Summary

Key findings of the Community Marketing & Insights (CMI) 14th Annual LGBTQ Community Survey®

Top Brands That Support the LGBTQ Community

In an un-aided write-in question, the brands that LGBTQ consumers consider as doing the best job outreaching to the community include: Absolut, Amazon, American Airlines, Apple, Delta Air Lines, Disney/ABC, Google, Nike, Starbucks, Subaru, Target, TomboyX, and Wells Fargo.

A Loss of Pride Events

There is a feeling of loss in the LGBTQ community this summer as many Pride events were canceled due to COVID-19. 82% of the LGBTQ participants feel that Pride events are "important to our community." Brands can address this loss and support LGBTQ Pride in their promotions this summer and beyond, even if they are not officially sponsoring big events this year.

Where LGBTQ People Live

LGBTQ survey participants live in a wide variety of community types within the United States. Gay and bi+ men have a higher likelihood to live in big cities, but even so, fewer than half of gay and bi+ men live in big city urban environments.

LGBTQ-friendly Communities

The more urban the area, the more LGBTQ-friendly the community is considered to be. 94% of LGBTQ participants consider the urban environment in which they live to be LGBTQ-friendly, compared to 45% of those living in small towns and rural areas. LGBTQ people living in smaller-size communities and the organizations that support them need support. Corporations often overlook smaller communities in their LGBTQ corporate giving. Distributing funds to these smaller communities is an important way to authentically support the entire LGBTQ community.

LGBTQ Community Feels Less Financially Confident

Survey participants completed a series of tracking questions about their finances and economic confidence. Not surprisingly, there was a downgrade in LGBTQ economic confidence this year, with 6% of participants downgrading their financial self-evaluation of the past year, and 13% downgrading their financial expectations for the future year.

The African American LGBTQ community expected the largest financial decline for the future year (down 19%) followed by the Latinx LGBTQ community (down 15%). This demonstrates the economic impact of both discrimination and COVID-19 on LGBTQ communities of color.

Executive Summary
Key findings of the Community Marketing & Insights (CMI) 14th Annual LGBTQ Community Survey®

LGBTQ Political Views
The LGBTQ community trends liberal: 56% would describe their political views as liberal and 29% moderate to liberal. 93% said that they will vote in the November election. 63% of the LGBTQ community has significant anxiety/tension about the upcoming election; 90% have at least some anxiety/tension about the election. Acknowledging this stress and supporting LGBTQ-favorable political candidates will make an impact on the LGBTQ community.

LGBTQ-friendly Employers
83% of participants consider their employer to be at least somewhat LGBTQ-friendly. This may mean that LGBTQ community members seek out supportive employers. Baby Boomers are most likely to consider themselves working for an LGBTQ-friendly employer, which might imply that with time, these older community members have found a more positive work situation. Being k own as an LGBTQ-friendly and inclusive corporation is important to attract and retain LGBTQ employees, as well as to earn the trust and loyalty of LGBTQ consumers.

Relationships
LGBTQ marriage rates continue to slowly increase every year (up 1% from last year to 34% of the LGBTQ participants in the research). Divorce from a same-sex partner remains the same as last year (and quite low at 2% from a same-sex partner). The data suggests that marriage equality has resulted in a large number of stable relationships.

Lesbian and bi+ women (40%) are more likely to be married vs. gay and bi+ men (30%). This has important consumer purchasing implications, as the decision-making process for purchases, and even types of products purchased, are often different when comparing single people to those in relationships.

Not all relationships are defined as binary (same-sex or opposite-sex couple). Many LGBTQ community members are in a relationship where at least one partner identifies as other than a cisgender man or woman. Corporations should be careful that terminology and policies are inclusive and respectful.

Executive Summary
Key findings of the Community Marketing & Insights (CMI) 14th Annual LGBTQ Community Survey®

Terminology Within the Community
In our annual update on community terminology, LGBTQ has overtaken LGBT as the preferred term to describe the community (although both test favorably). Adding the "+" symbol (LGBTQ+) gained some acceptance over the past year (3% more favorable), but LGBTQ+ still lags behind LGBTQ.

Caring for a Pet
65% of LGBTQ community members care for a pet or companion animal at home, which is comparable to the general population. Lesbian and bi+ women were most likely to care for a pet (75%). Including pets in advertising creative will connect with the majority of LGBTQ consumers.

Alcohol and Cannabis Use
Wine, beer, and vodka are the most popular alcohol beverages consumed by LGBTQ community members, but there are important demographic differences in consumption patterns. For example, vodka is far more popular among gay men. Transgender and non-binary participants had significantly lower alcohol consumption patterns.

37% of the LGBTQ community reported using cannabis/marijuana in any form for recreational or medical reasons in the past 12 months. Consumption was highest among the Millennial, transgender, and non-binary communities.

LGBTQ Consumer Products
The research contains purchasing data or references to other CMI reports for many different types of consumer products including beverages, skincare, health, electronics, entertainment, financial services, auto, and more.

LGBTQ Media Viewers
Readership of LGBTQ print media is stable, while LGBTQ digital consumption is increasing.

Advertising in the LGBTQ media makes a purchasing difference to 72% of the LGBTQ community. The research shows that advertising in the LGBTQ media is more impactful to LGBTQ consumers than advertising in the general population media, and the LGBTQ community trusts the LGBTQ media more than the reporting in the general media.

Although marketers reach LGBTQ consumers through general market media, advertising in LGBTQ media makes a more impactful and productive connection.

1

Impact of Outreach to the LGBTQ Community

**CMI's 14th Annual LGBTQ Community Survey® • June 2020
Among All LGBTQ Participants**

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

85% Agree

13% Neutral

2% Disagree

**CMI's 14th Annual LGBTQ Community Survey® • June 2020
Among All LGBTQ Participants**

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

80% Agree

18% Neutral

2% Disagree

Base: All LGBTQ n=17,230

CMI's 14th Annual LGBTQ Community Survey® • June 2020
Among All LGBTQ Participants

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

72% Agree
25% Neutral
3% Disagree

**CMI's 14th Annual LGBTQ Community Survey® • June 2020
Among All LGBTQ Participants**

Have you made a conscious decision to make a purchase over the past 12 months, at least partially due to a company's LGBTQ-inclusive outreach, employment practices, or LGBTQ-supportive political stance?

73% Yes

15% Not Sure

2% No

% that said Yes

Transgender & Non-Binary Participants	75%
Cisgender Lesbian & Bi+ Women	75%
Cisgender Gay & Bi+ Men	71%
Millennials+	73%
Generation X	75%
Baby Boomers+	70%

**CMI's 14th Annual LGBTQ Community Survey® • June 2020
Among All LGBTQ Participants**

"Pride events are important to our community."

82% Agree
15% Neutral
3% Disagree

Base: All LGBTQ n=17,230

CMI Community Marketing & Insights 18
Leaders in LGBTQ Research since 1992

CMI's 14th Annual LGBTQ Community Survey® • June 2020
Among All LGBTQ Participants

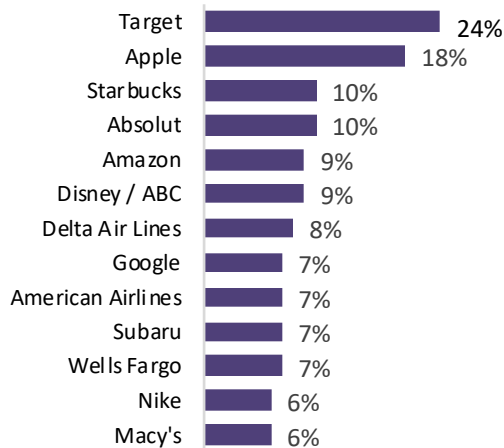*"I fear there will be a rollback of LGBTQ equality gains in the coming year."*

61% Agree

30% Neutral

8% Disagree

Base: All LGBTQ n=17,230

Brand Recall: Every year, CMI asks an unaided, "write-in" recall question about brands that show genuine, authentic support of the LGBTQ community through their outreach or pro-LGBTQ policies or practices. The top brand list and percentages were very similar to 2019, with very small percentage changes up and down. Note the success of some smaller brands for the lesbian and bi+ women and gender-expansive community members.

In the past 12 months, which companies or brands have gone above and beyond to show genuine, authentic support of the LGBTQ community through their outreach or pro-LGBTQ policies or practices? You may write up to 5 companies or brands.

Cisgender Gay & Bi+ Men

Brand	Percent
Target	24%
Apple	18%
Starbucks	10%
Absolut	10%
Amazon	9%
Disney / ABC	9%
Delta Air Lines	8%
Google	7%
American Airlines	7%
Subaru	7%
Wells Fargo	7%
Nike	6%
Macy's	6%

3%-5%

AT&T, Bank of America, Ben & Jerry's, Budweiser, Chase/JP Morgan, Coca-Cola, GAP, Hilton, IKEA, Levi's, Marriott, Microsoft, Molson/Coors/Miller, Netflix, United Airlines, Verizon

Cisgender Lesbian & Bi+ Women

Brand	Percent
Target	30%
Subaru	15%
Starbucks	10%
Apple	9%
TomboyX	8%
Amazon	7%
Google	7%
Nike	7%
Absolut	6%
IKEA	6%
Disney / ABC	5%
Wildfang	5%

3%-4%

American Airlines, AT&T, Ben & Jerry's, Budweiser, Campbell's, Chase/JP Morgan, Coca-Cola, Converse, Delta Air Lines, GAP, Levi's, Macy's, REI, Wells Fargo

Transgender and Non-Binary Participants

Brand	Percent
Target	31%
Starbucks	14%
Amazon	10%
TomboyX	8%
Apple	7%
Nike	5%
gc2b	5%
Subaru	5%
Google	5%
IKEA	5%
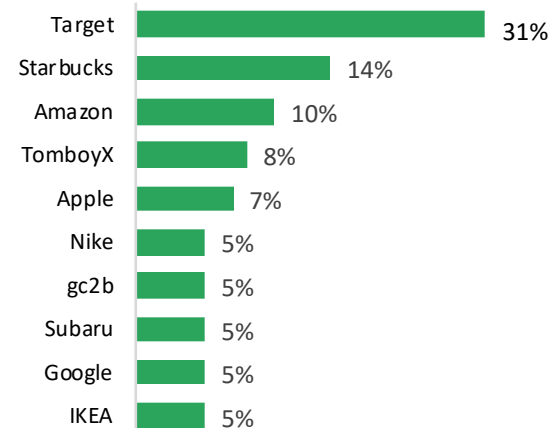
3%-4%

Absolut, AT&T, Ben & Jerry's, Coca-Cola, Disney/ABC, GAP, Levi's, Macy's, Microsoft, Netflix, Sephora, Wells Fargo

Base: Respondents Who Answered This Question, Cisgender Gay & Bi+ Men n=5,828;
Cisgender Lesbian & Bi+ Women n=1,674; Gender Expansive Members n=807

How Companies Make an Impact: In past research, CMI has established that sponsorship of LGBTQ community organizations as well as taking a stand for LGBTQ human rights are key ways to establish a brand as being an authentic LGBTQ partner. What this chart establishes is that it takes more than doing the "right thing." Corporations need to communicate their efforts to the community; otherwise good deeds can go unrecognized.

If you chose a brand on the above question (previous slide), how have these brands communicated to you that they are LGBTQ-supportive? Please mark any that have informed you about a company's LGBTQ support.

Among All LGBTQ Participants

Method	%
Seeing the brand advertise in the LGBTQ media (print or digital)	59%
The brand sponsored an LGBTQ event	49%
Brand was in the news regarding their support of an LGBTQ issue	45%
Brand sponsors or participates in LGBTQ Pride events	44%
Seeing the brand's posting on social media	43%
Brand donates to LGBTQ organizations	41%
Seeing brand offering LGBTQ-themed merchandise	41%
Positive word of mouth from LGBTQ friends	37%
Hearing an LGBTQ-friendly celebrity or influencer talk about the brand	16%
Other method	9%
None of the above	2%

Base: Among Respondents Who Answered This Question n=8,998

2

LGBTQ
Finances

Financial Confidence: The survey asks participants multi-year tracking questions about their financial and economic confidence. In these uncert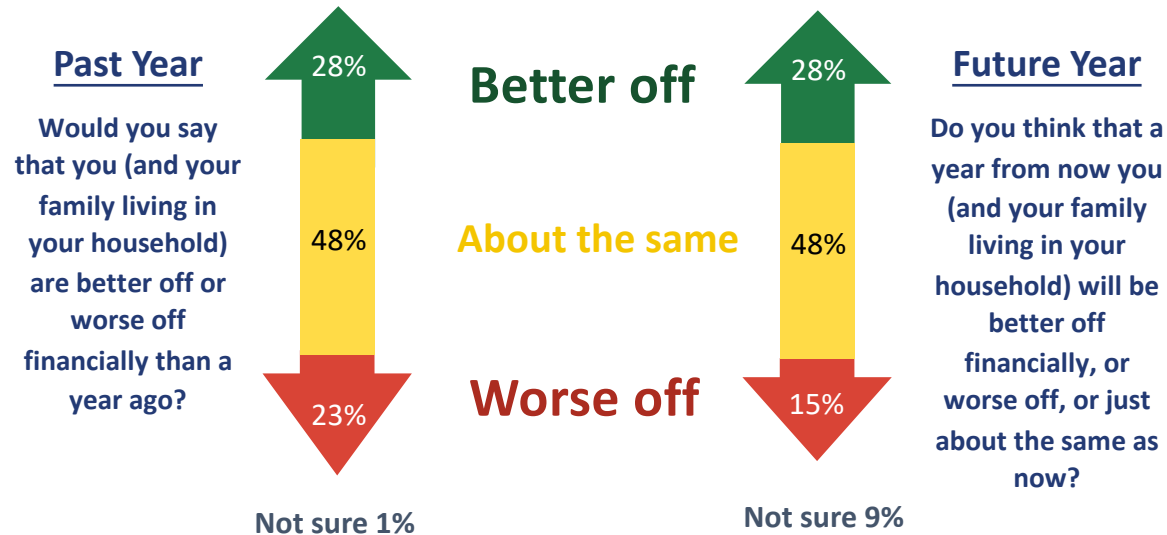ain times, there was a downgrade in LGBTQ economic confidence compared to last year. Compared to the 2019 result, 6% of participants downgrading their financial situation for the past year, and 13% downgrading their economic expectation for the future year. The African American LGBTQ community had the largest loss of economic confidence for the future year.

2020 Results

Past Year

Would you say that you (and your family living in your household) are better off or worse off financially than a year ago?

28%

48%

23%

Not sure 1%

Better off

About the same

Worse off

28%

48%

15%

Not sure 9%

Future Year

Do you think that a year from now you (and your family living in your household) will be better off financially, or worse off, or just about the same as now?

Compared to 2019 Results Decrease in Better Off Response		
	Past Year	Future Year
All LGBTQ	-6%	-13%
Cisgender Gay & Bi+ Men	-7%	-14%
Cisgender Lesbian & Bi+ Women	-6%	-14%
Transgender & Non-Binary Participants	-3%	-6%
Millennials+	-5%	-15%
Generation X	-7%	-16%
Baby Boomers+	-6%	-9%
Asian / Pacific Islander	-2%	-6%
Black / African American	-6%	-19%
Latinx	-2%	-15%
White (Non-Hispanic)	-7%	-13%

Base: All LGBTQ n=17,230

Financial Products and Services: The types of financial services utilized may be very different by generation.

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

	All LGBTQ	Millennials+	Generation X	Baby Boomers+
Checking account	96%	95%	95%	96%
Credit card (any kind)	87%	84%	86%	90%
Retirement account of any kind (e.g., 401K, IRA, RRSP, TFSA)	65%	60%	70%	67%
Money market, savings, or CD account	54%	54%	52%	56%
Home mortgage	37%	22%	48%	42%
Utilize tax advice or tax preparation services	31%	23%	31%	39%
Online brokerage account / stock purchase account	29%	25%	30%	30%
Student loan	28%	46%	30%	8%
Financial planning services (by company or independent financial planner)	22%	12%	22%	33%
Home improvement or home equity loan	8%	2%	10%	12%
Prefer not to answer	2%	1%	2%	2%
None of the above	1%	1%	1%	0%

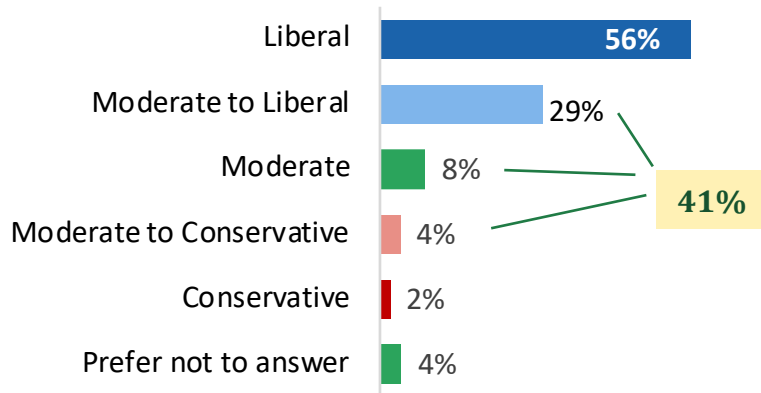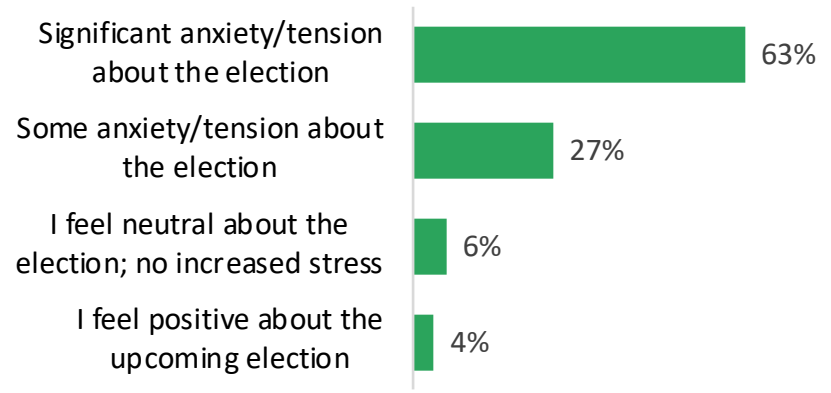Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

3

LGBTQ Elections Politics and Priorities

Political Views: Most of the LGBTQ participants trend liberal to moderate/liberal (85%). However, 41% indicated some moderate political views (50% of cisgender men, 33% of the cisgender women and 33% transgender/non-binary participants). By generation, Millennials+ (64%) and Baby Boomers+ (54%) were most likely to describe them themselves as liberal, with Generation X being most likely to have some moderate views (46%). Very few in the LGBTQ community would describe themselves as conservative. There is great anxiety about the upcoming USA presidential election in the LGBTQ community.

In general, how would you describe your political views?
Among All LGBTQ

Category	%
Liberal	56%
Moderate to Liberal	29%
Moderate	8%
Moderate to Conservative	4%
Conservative	2%
Prefer not to answer	4%

41%

How are you feeling about the upcoming USA presidential election?
Among All LGBTQ

Category	%
Significant anxiety/tension about the election	63%
Some anxiety/tension about the election	27%
I feel neutral about the election; no increased stress	6%
I feel positive about the upcoming election	4%

Base: All LGBTQ n=17,230

Political Activity: Overall, survey participants indicated a high level of political activity, especially voting. 93% said that they will vote in the November 2020 election.

Have you already, or do you plan to do any of the following in 2020? Among All LGBTQ

Activity	Percentage
Vote in the national election in November	93%
Vote in a primary election	85%
*Boycott a company because of their political views	54%
Post or share political news/information on social media	44%
Donate to a political candidate	43%
Attend a political rally or event for a candidate	21%
Volunteer for a political candidate	17%
Purchase a ticket to a political fundraiser	6%
None of the above	3%

% to Vote in November

Cisgender Lesbian & Bi+ Women	94%
Cisgender Gay & Bi+ Men	92%
Transgender/Non-Binary Participants	91%
Millennials+	90%
Generation X	92%
Baby Boomers+	96%

*Boycott a company because of their political views or support for a candidate
Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

Voting Motivations: All of the below concerns are considered important; however, there are differences in the level of importance. The five most pressing issues facing the LGBTQ community are: LGBTQ equality, health care quality and cost, fair elections/protection of democracy, racial discrimination, and the ability to respond to the COVID-19 pandemic.

Of these broad concerns, how important are these issues to you, when considering voting for one political candidate over another? Among All LGBTQ

Legend: ■ Very important   ■ Somewhat important   ■ Little or no Importance

Issue	Very important	Somewhat important
LGBTQ equality	91%	8%
Health care quality and cost	89%	10%
Fair elections / protection of democracy	88%	11%
Racial discrimination	85%	13%
Ability to respond to the pandemic	85%	13%
Environment and climate	82%	16%
Court / supreme court appointments	81%	16%
Women's issues including reproductive rights	80%	17%
Transgender rights and safety	71%	24%
Violence, crime and gun concerns	70%	27%
Economic, tax and employment	68%	31%
Education quality and cost	68%	28%
Immigration	64%	32%
Foreign policy	56%	40%
Cyber security	54%	40%

Base: All LGBTQ n=17,230

Voting Motivations by Demographic: Looking only at the 85% or greater priorities, there are demographic differences by gender identity, generation, and race/ethnicity. For example, there was a 13% difference between Black participants (90%) and White participants (83%) on the importance of racial discrimination. Fighting for transgender rights was important to 93% of gender-expansive participants, vs. 60% of gay & bi+ men. 90% of Baby Boomers were concerned about Supreme Court appointments, compared to 71% of Millennials. While it might be expected that some issues are more important to different communities within LGBTQ, this is also a time that the community as a whole must be fighting for each other's rights.

Of these broad concerns, how important are these issues to you, when considering voting for one political candidate over another?

	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants
Ability to respond to the pandemic	86%	85%	
Fair elections / protection of democracy	88%	88%	87%
Health care quality and cost	91%	87%	91%
LGBTQ equality	93%	87%	93%
Racial discrimination	91%		87%
Transgender rights and safety			93%
Women's issues including reproductive rights	93%		

Presented alphabetically by topic	Asian / Pacific Islander	Black / African American	Latinx	White (Non-Hispanic)
Ability to respond to the pandemic		88%	87%	85%
Fair elections / protection of democracy		90%	89%	88%
Health care quality and cost	89%	91%	89%	89%
LGBTQ equality	87%	90%	92%	91%
Racial discrimination	90%	96%	88%	

	Millennials+	Generation X	Baby Boomers+
Ability to respond to the pandemic			90%
Court / Supreme Court appointments			90%
Environment and climate			85%
Fair elections / protection of democracy		87%	94%
Health care quality and cost	88%	87%	93%
LGBTQ equality	90%	90%	91%
Racial discrimination	87%		85%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

CMI Community Marketing & Insights 29
Leaders in LGBTQ Research since 1992

Voting Motivations Full List:

Of these broad concerns, how important are these issues to you, when considering voting for one political candidate over another? Among All LGBTQ

Presented alphabetically by topic	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants	Millennials+	Generation X	Baby Boomers+	Asian / Pacific Islander	Black / African American	Latinx	White
Ability to respond to the pandemic	86%	85%	83%	81%	84%	90%	84%	88%	87%	85%
Court / Supreme Court appointments	81%	82%	76%	71%	82%	90%	69%	76%	75%	83%
Cyber security	52%	57%	49%	43%	54%	66%	51%	61%	57%	53%
Economic, tax and employment	65%	72%	62%	63%	68%	71%	69%	78%	71%	66%
Education quality and cost	71%	63%	72%	73%	64%	66%	75%	80%	75%	65%
Environment and climate	84%	79%	82%	82%	77%	85%	80%	77%	84%	82%
Fair elections / protection of democracy	88%	88%	87%	83%	87%	94%	82%	90%	89%	88%
Foreign policy	54%	60%	49%	50%	53%	64%	59%	55%	57%	56%
Health care quality and cost	91%	87%	91%	88%	87%	93%	89%	91%	89%	89%
Immigration	68%	59%	65%	69%	58%	64%	75%	63%	75%	62%
LGBTQ equality	93%	87%	93%	90%	90%	91%	87%	90%	92%	91%
Racial discrimination	91%	78%	87%	87%	82%	85%	90%	96%	88%	83%
Transgender rights and safety	78%	60%	93%	78%	69%	67%	71%	76%	75%	71%
Violence, crime and gun concerns	73%	70%	62%	67%	67%	77%	71%	78%	76%	69%
Women's issues including reproductive rights	93%	66%	84%	82%	77%	80%	76%	84%	81%	79%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

Priorities for the LGBTQ Movement for the Next 10 Years by Gender with Highlighted Differences

What are your priorities for the LGBTQ movement for the next 10 years? Please mark the LGBTQ causes that motivate you to volunteer, donate, support, get involved, etc. Please limit your choices to those that are most important to you.	ALL LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants
Supporting LGBTQ youth, anti-bullying and/or teen suicide issues	71%	70%	72%	70%
Supporting LGBTQ workplace equality	61%	59%	63%	61%
Stopping anti-LGBTQ "religious freedom" legislation	57%	54%	58%	61%
Supporting LGBTQ and LGBTQ-friendly political candidates	55%	54%	57%	49%
Supporting transgender rights	**50%**	**52%**	**41%**	**85%**
Expanding LGBTQ senior care	48%	49%	48%	45%
Supporting ethnic / racial equality within the LGBTQ community	47%	51%	42%	57%
Protecting and expanding marriage equality	43%	44%	45%	33%
Reduce the social and legal obstacles of LGBTQ parenting	39%	42%	36%	42%
Supporting HIV education, prevention and care	**37%**	**24%**	**49%**	**38%**
Supporting women's causes within the LGBTQ community	**33%**	**48%**	**18%**	**31%**
Supporting protections for LGBTQ immigrants to your country	32%	31%	31%	43%
Supporting international LGBTQ rights	32%	28%	35%	37%
Supporting and expanding the visibility of the bisexual community*	20%	20%	17%	29%
Other	2%	2%	2%	6%
None of the above	2%	1%	2%	1%

*43% among participants with bisexual and pansexual participants

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

Priorities for the LGBTQ Movement for the Next 10 Years by Generation with Highlighted Differences

What are your priorities for the LGBTQ movement for the next 10 years? Please mark the LGBTQ causes that motivate you to volunteer, donate, support, get involved, etc. Please limit your choices to those that are most important to you.	ALL LGBTQ	Millennials+	Generation X	Baby Boomers+
Supporting LGBTQ youth, anti-bullying and/or teen suicide issues	71%	71%	72%	69%
Supporting LGBTQ workplace equality	61%	63%	62%	59%
Stopping anti-LGBTQ "religious freedom" legislation	57%	55%	57%	57%
Supporting LGBTQ and LGBTQ-friendly political candidates	55%	50%	54%	60%
Supporting transgender rights	50%	64%	48%	39%
Expanding LGBTQ senior care	**48%**	**34%**	**45%**	**65%**
Supporting ethnic / racial equality within the LGBTQ community	**47%**	**62%**	**43%**	**38%**
Protecting and expanding marriage equality	43%	38%	45%	48%
Reduce the social and legal obstacles of LGBTQ parenting	39%	47%	37%	33%
Supporting HIV education, prevention and care	37%	42%	35%	34%
Supporting women's causes within the LGBTQ community	33%	32%	30%	37%
Supporting protections for LGBTQ immigrants to your country	32%	40%	28%	28%
Supporting international LGBTQ rights	32%	39%	28%	29%
Supporting and expanding the visibility of the bisexual community	20%	28%	17%	13%
Other	2%	2%	2%	2%
None of the above	2%	1%	2%	1%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

Priorities for the LGBTQ Movement for the Next 10 Years by Ethnicity with Highlighted Differences

What are your priorities for the LGBTQ movement for the next 10 years? Please mark the LGBTQ causes that motivate you to volunteer, donate, support, get involved, etc. Please limit your choices to those that are most important to you.	ALL LGBTQ	Asian / Pacific Islanders	Black / African American	Latinx	White (Non-Hispanic)
Supporting LGBTQ youth, anti-bullying and/or teen suicide issues	71%	67%	72%	74%	71%
Supporting LGBTQ workplace equality	61%	57%	64%	62%	61%
Stopping anti-LGBTQ "religious freedom" legislation	57%	47%	46%	55%	59%
Supporting LGBTQ and LGBTQ-friendly political candidates	55%	42%	46%	51%	57%
Supporting transgender rights	50%	49%	51%	55%	50%
Expanding LGBTQ senior care	48%	34%	44%	45%	50%
Supporting ethnic / racial equality within the LGBTQ community	**47%**	**72%**	**76%**	**60%**	**41%**
Protecting and expanding marriage equality	43%	37%	38%	45%	45%
Reduce the social and legal obstacles of LGBTQ parenting	39%	38%	40%	46%	38%
Supporting HIV education, prevention and care	37%	45%	43%	45%	35%
Supporting women's causes within the LGBTQ community	33%	28%	38%	36%	32%
Supporting protections for LGBTQ immigrants to your country	**32%**	**44%**	**30%**	**43%**	**30%**
Supporting international LGBTQ rights	**32%**	**43%**	**31%**	**41%**	**30%**
Supporting and expanding the visibility of the bisexual community	20%	21%	25%	24%	18%
Other	2%	2%	2%	2%	2%
None of the above	2%	2%	1%	1%	1%

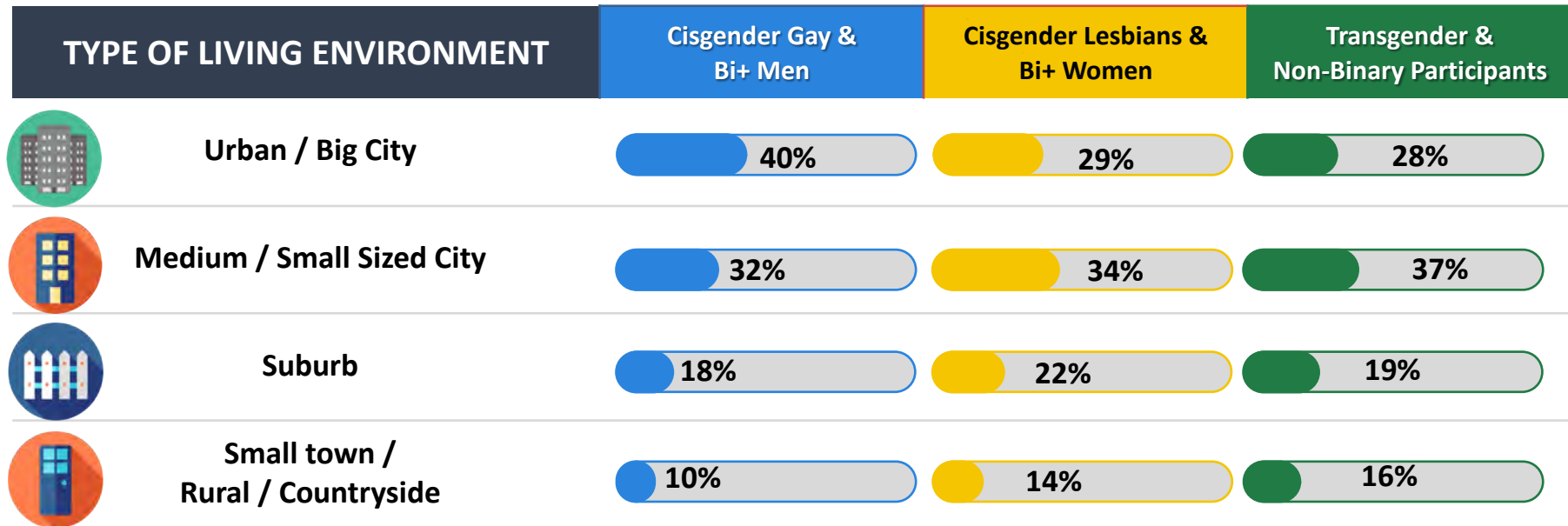Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

4

LGBTQ Demographics

Type of Community: LGBTQ survey participants live in a wide variety of community types. Gay and bi+ men do have a higher likelihood to live in big cities, but even so, fewer than half of gay and bi+ men live in urban / big city environments.
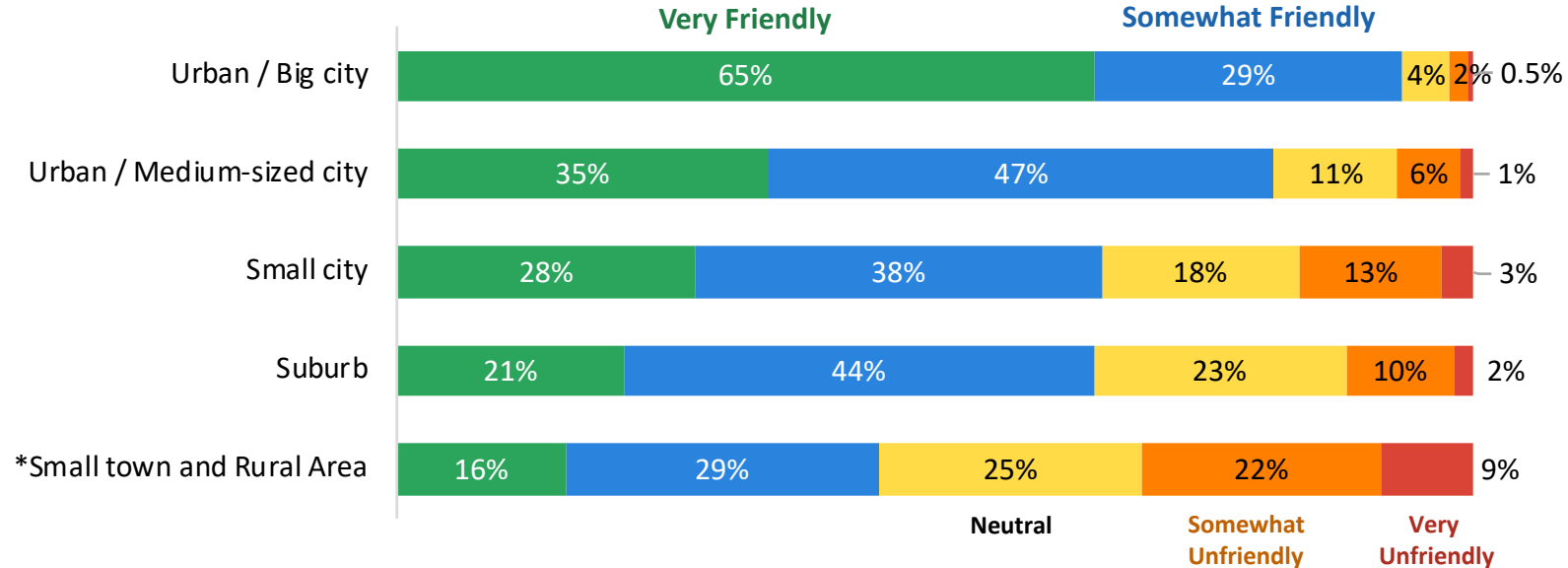
What type of environment best describes the primary place in which you live?

TYPE OF LIVING ENVIRONMENT	Cisgender Gay & Bi+ Men	Cisgender Lesbians & Bi+ Women	Transgender & Non-Binary Participants
Urban / Big City	40%	29%	28%
Medium / Small Sized City	32%	34%	37%
Suburb	18%	22%	19%
Small town / Rural / Countryside	10%	14%	16%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

LGBTQ-Friendliness of Their Community: The more urban the area, the more LGBTQ-friendly the community is considered to be. 94% of LGBTQ participants think that their big city urban environments are LGBTQ-friendly compared to 45% of those living in small towns and rural areas. Few in rural settings consider their area to be very LGBTQ-unfriendly.

How LGBTQ-friendly do you consider the place in which you live?

Among LGBTQ Participants Living in Different Types of Communities

	Very Friendly	Somewhat Friendly	Neutral	Somewhat Unfriendly	Very Unfriendly
Urban / Big city	65%	29%	4%	2%	0.5%
Urban / Medium-sized city	35%	47%	11%	6%	1%
Small city	28%	38%	18%	13%	3%
Suburb	21%	44%	23%	10%	2%
*Small town and Rural Area	16%	29%	25%	22%	9%

*Small town surrounded by countryside and Rural Area

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992　**36**

LGBTQ-Friendliness of Their Community: Perception of LGBTQ-friendliness may be based on the level of discrimination that a demographic receives. The data suggests that overall cisgender gay and bi+ men receive the least amount of discrimination and transgender and non-binary participants have far more discrimination concerns. However, gay and bi+ men are more likely to live in big cities, which are considered overall to be more LGBTQ-friendly.

How LGBTQ-friendly do you consider the place in which you live?

	All LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants	Millennials+	Generation X	Baby Boomers+
Very LGBTQ-friendly	39%	35%	45%	29%	40%	36%	41%
Somewhat LGBTQ-friendly	37%	40%	33%	39%	37%	38%	35%
Neutral	14%	14%	14%	15%	14%	14%	13%
Somewhat LGBTQ-unfriendly	8%	9%	7%	13%	7%	9%	8%
Very LGBTQ-unfriendly	2%	2%	2%	5%	2%	3%	2%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

LGBTQ-Friendly Employers: 83% of participants consider their employer to be at least somewhat LGBTQ-friendly. This may mean that LGBTQ community members seek out supportive employers. Baby Boomers are most likely to consider themselves to be working for a very LGBTQ-friendly employer, which might imply that with time, these older community members have found a more positive work environment. Younger participants may still be searching for the right LGBTQ-friendly employer.

How LGBTQ-friendly do you consider your primary employer or company to be?

	All LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants	Millennials+	Generation X	Baby Boomers+
Very LGBTQ-friendly	53%	52%	55%	48%	49%	54%	59%
Somewhat LGBTQ-friendly	30%	31%	27%	33%	33%	29%	25%
Neutral	11%	10%	11%	9%	11%	11%	10%
Somewhat LGBTQ-unfriendly	4%	4%	3%	7%	5%	4%	3%
Very LGBTQ-unfriendly	1%	1%	1%	2%	1%	1%	1%

Base: Employed LGBTQ Respondents n=10,430

Relationship Status: Marriage rates continue to slowly increase within the LGBTQ community (up 1% from last year). Divorce rates remain the same as last year. As in past years, lesbian and bi+ women are more likely to be in a relationship. This has important consumer purchasing implications, as the decision-making process for purchases, and even types of products purchased, are often different when comparing single people to those in relationships.

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

	Cisgender Gay & Bisexual Men	Cisgender Lesbian & Bisexual Women	Transgender and Non-Binary Participants
Single / not in a relationship	40%	27%	40%
In a relationship but not living with a partner (dating)	8%	10%	11%
In a relationship and living with a partner (no legal status)	17%	16%	15%
Legally married	30%	40%	28%
Civil union, registered domestic partner or common law	2%	2%	1%
Engaged	2%	3%	3%
Widow / Widower	3%	3%	2%
Divorced from a same-sex spouse	1%	3%	2%
Divorced from an opposite-sex spouse	2%	3%	5%
Polyamorous relationship	2%	3%	9%
Other	1%	2%	3%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

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

You indicated that you are in a relationship. How would you describe your relationship? Please mark any that apply.
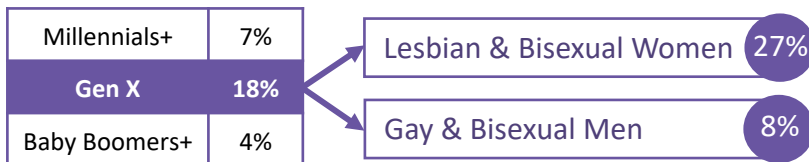
Among Those In a Relationship

	Cisgender Gay & Bisexual Men	Cisgender Lesbian & Bisexual Women	Transgender and Non-Binary Participants
Female same-sex couple (female-female couple)	--	83%	20%
Male same-sex couple (male-male couple)	94%	--	20%
Opposite-sex couple (female-male couple)	6%	13%	18%
Non-binary / Transgender couple (where one or both partners identifies as transgender or outside the gender binary)	1%	5%	57%
Queer couple (any gender)	2%	11%	35%
Polyamorous relationship	3%	5%	16%
Other	<1%	1%	2%

Base: LGBTQ Participants in a Relationship n=10,547 (See methodology for segment bases and weighting.)

CMI Community Marketing & Insights   Leaders in LGBTQ Research since 1992   **40**

LGBTQ Parents: There are more LGBTQ parents than many might think. In this study, 22% of LGBTQ participants have a child of any age. Lesbian & bi+ women are most likely to have children. Since the 2017 report, we have not seen significant increases in LGBTQ parent percentages. It should be noted that these parent rates may be lower than other LGBTQ studies as this survey may have smaller percentages of bisexual participants.

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

	All LGBTQ	Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender and Non-Binary Participants
Parents (children of any age)	**22%**	**14%**	**30%**	**25%**
Yes, I have children under age 18 living in my home	8%	3%	13%	10%
Yes, I have children under age 18 not living in my home	2%	1%	2%	3%
Yes, I have children age 18 or over	15%	10%	19%	16%
Prefer not to answer	1%	<1%	1%	1%

Segments with Children Under Age 18

Millennials+	7%
Gen X	**18%**
Baby Boomers+	4%

→ Lesbian & Bisexual Women 27%

→ Gay & Bisexual Men 8%

19% of Baby Boomers+ Have Grandchildren

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

LGBTQ Community and Pets: LGBTQ community members have pet guardianship rates about the same as the general population. However, lesbian and bi+ women and gender-expansive community members have much higher rates than gay and bi+ men. This may be because gay and bi+ men often live in big cities where caring for a pet can be more difficult. Consumer brands can connect with the LGBTQ community through the use of pet imagery and related messages, as pets may take on a bigger role in LGBTQ households.

Do you care for a pet or companion animal at home? Please mark all that apply.	ALL LGBTQ	Cisgender Lesbians & Bi+ Women	Cisgender Gay & Bi+ Men	Gender Expansive
Yes, I have a pet or companion animals at home	65%	75%	54%	68%
One or more dogs	42%	47%	37%	37%
One or more cats	34%	44%	21%	42%
Other type(s) of pet or animal	7%	9%	5%	9%
No, I have no pets or companion animals at home	35%	25%	46%	32%

USA General Population Pet in Home Rate is 67%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)
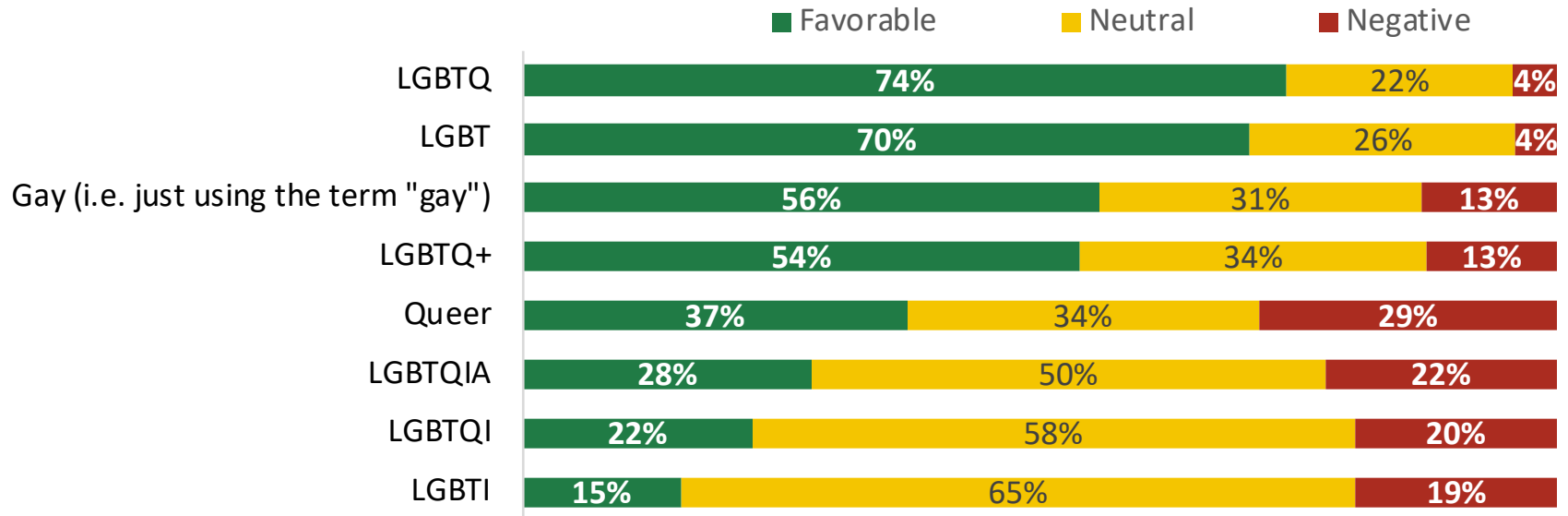
5

Terminology Within the Community

Terminology Within the LGBTQ Community: In our annual poll about community terminology, LGBTQ has overtaken LGBT as the preferred term to describe our community (although both test favorably). However, the more important change over time is the comparative lack of a negative response to nearly all the terms. In earlier years, some reacted more negatively to the letter Q and the term Queer. Adding the "+" symbol gained some acceptance over the past year (3% more positive), but still lags behind LGBTQ.

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

Term	■ Favorable	■ Neutral	■ Negative
LGBTQ	74%	22%	4%
LGBT	70%	26%	4%
Gay (i.e. just using the term "gay")	56%	31%	13%
LGBTQ+	54%	34%	13%
Queer	37%	34%	29%
LGBTQIA	28%	50%	22%
LGBTQI	22%	58%	20%
LGBTI	15%	65%	19%

Base: All LGBTQ n=17,230

Terminology by Demographic: Detail of More Popular Terms

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

Gender identity and Generation have different opinions about these terms

		Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Millennials+	Generation X	Baby Boomers+
LGBT	Favorable	**75%**	68%	59%	63%	71%	**78%**
	Neutral	22%	28%	34%	32%	25%	20%
	Negative	3%	4%	7%	5%	4%	3%
LGBTQ	Favorable	70%	**78%**	**76%**	**78%**	72%	72%
	Neutral	24%	20%	21%	19%	24%	23%
	Negative	6%	3%	3%	3%	4%	5%
LGBTQ+	Favorable	44%	60%	**69%**	**72%**	51%	37%
	Neutral	39%	30%	25%	21%	35%	45%
	Negative	18%	9%	6%	7%	14%	18%
Queer	Favorable	27%	43%	**55%**	**51%**	32%	28%
	Neutral	35%	34%	27%	31%	37%	35%
	Negative	37%	23%	18%	18%	31%	37%
Gay (i.e. just using the term "gay")	Favorable	**67%**	50%	32%	41%	56%	**71%**
	Neutral	25%	35%	40%	39%	31%	23%
	Negative	8%	15%	27%	20%	13%	7%

Complex Relationship with Queer: At CMI, we receive spirited comments on both sides about the term Queer; that we should *stop using* the word Queer because it is offensive and that we should *exclusively use* the word Queer as the new umbrella term for the entire community. The data does not support either argument. Instead, the data supports a complex community relationship with the term.

Do you personally identify as Queer?

Yes	49%
No	28%
Sometimes	16%
Not Sure	6%
Prefer not to answer	1%

All LGBTQ
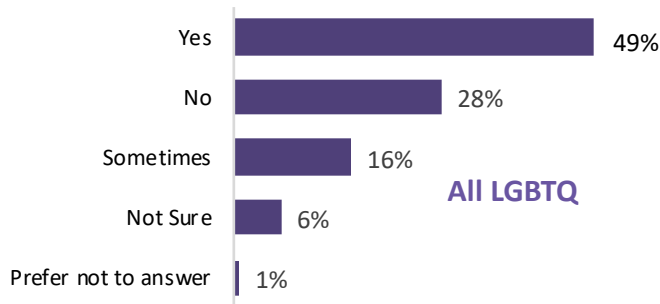
When you think of the word "Queer" (either to describe yourself or another person), what does it mean to you? (Please mark all that apply.)

An umbrella term for all LGBT people	45%
A descriptor of sexual orientation	40%
A descriptor of a cultural identity	36%
I generally do not use the word Queer	32%
A descriptor of gender identity	25%
I have negative feelings about the word Queer	20%
A descriptor of a subset in the LGBT community	15%
Other	2%
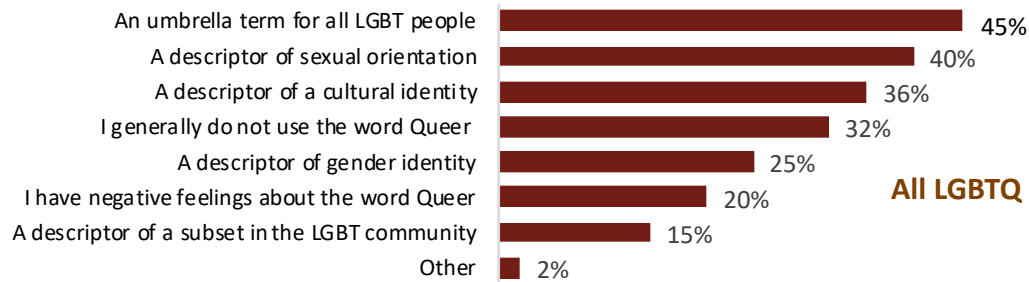
All LGBTQ

Indicated "Yes"	
Cisgender Lesbian & Bi+ Women	52%
Cisgender Gay & Bi+ Men	42%
Transgender & Non-Binary Participants	66%
Millennials+	59%
Generation X	44%
Baby Boomers+	43%

Indicated "An umbrella term for all LGBT people"	
Cisgender Lesbian & Bi+ Women	51%
Cisgender Gay & Bi+ Men	38%
Transgender & Non-Binary Participants	52%
Millennials+	61%
Generation X	42%
Baby Boomers+	32%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

46

6

Media and Events

LGBTQ Media Interaction (Past 12 Months): The overall interpretation of the chart below indicates that readership of LGBTQ print media is stable and LGBTQ digital viewership is increasing.
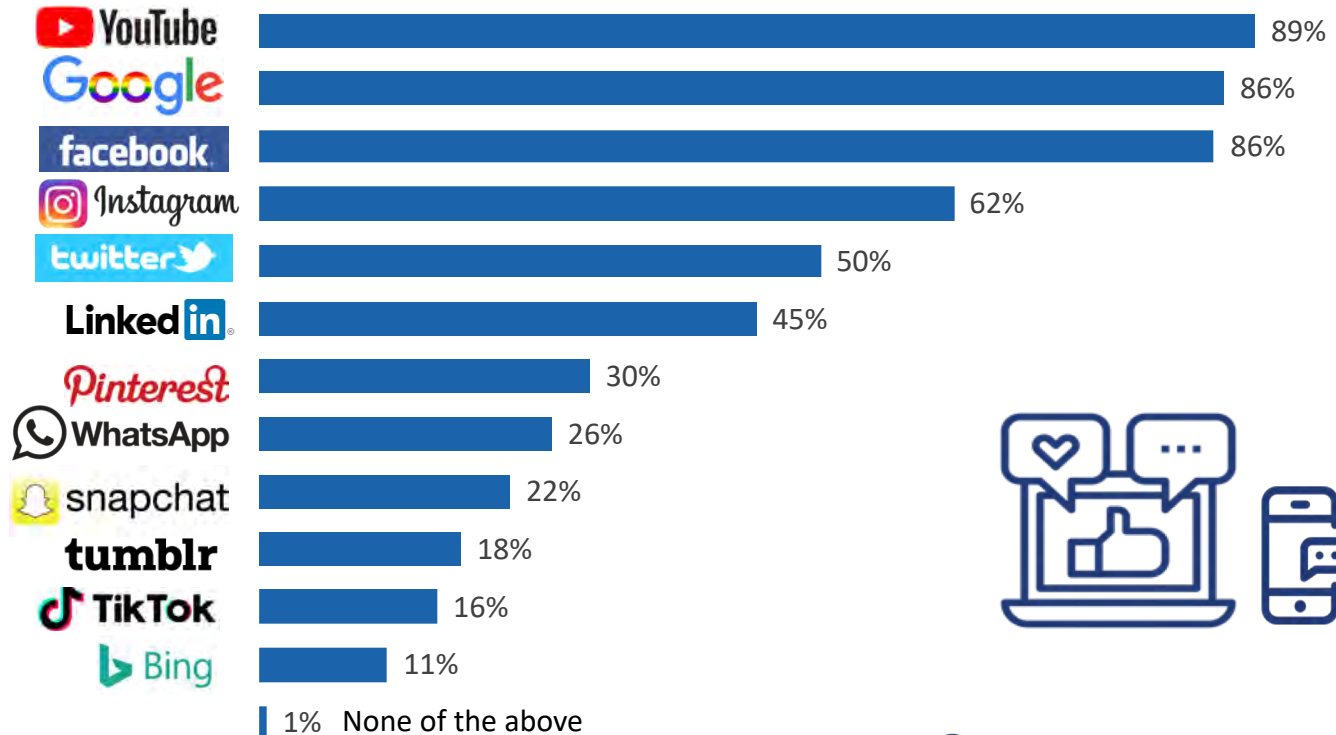
Has your interaction with LGBTQ media (newspapers, websites, etc.) changed over the past 12 months?

		ALL LGBTQ	Millennials+	Generation X	Baby Boomers+
Visiting LGBTQ news websites/apps	Increased	24%	25%	24%	24%
	Same	57%	54%	59%	59%
	Decreased	5%	6%	6%	4%
	Do not read	13%	15%	11%	13%
Visiting LGBTQ entertainment websites/apps	Increased	21%	25%	20%	17%
	Same	57%	53%	59%	57%
	Decreased	7%	6%	7%	6%
	Do not read	16%	15%	13%	19%
Reading LGBTQ regional newspapers	Increased	10%	11%	10%	10%
	Same	50%	41%	51%	57%
	Decreased	8%	6%	9%	9%
	Do not read	32%	42%	30%	24%
Reading LGBTQ national magazines	Increased	10%	10%	9%	9%
	Same	50%	43%	52%	57%
	Decreased	8%	6%	10%	9%
	Do not read	32%	41%	29%	26%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

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

Among All LGBTQ

Platform	Percentage
YouTube	89%
Google	86%
facebook	86%
Instagram	62%
twitter	50%
LinkedIn	45%
Pinterest	30%
WhatsApp	26%
snapchat	22%
tumblr	18%
TikTok	16%
Bing	11%
None of the above	1%

Base: All LGBTQ n=17,230

CMI **Community Marketing & Insights** 49
Leaders in LGBTQ Research since 1992

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

	All LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants		Millennials+	Generation X	Baby Boomers+
YouTube	89%	89%	89%	91%		**93%**	90%	85%
Google Search	86%	87%	86%	87%		88%	87%	85%
Facebook	86%	88%	84%	83%		85%	86%	86%
Instagram	62%	62%	62%	61%		**82%**	65%	40%
Twitter	50%	47%	53%	52%		**61%**	53%	37%
LinkedIn	45%	43%	**48%**	37%		**49%**	**49%**	36%
Pinterest	30%	**36%**	23%	30%		29%	32%	27%
WhatsApp	26%	23%	**30%**	20%		**33%**	25%	21%
Snapchat	22%	21%	24%	25%		**43%**	19%	6%
Tumblr	18%	10%	**25%**	**25%**		**25%**	17%	13%
TikTok	16%	16%	15%	18%		**27%**	15%	6%
Bing	11%	9%	14%	11%		7%	12%	**16%**

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting.)

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

How are you influenced when companies advertise in the LGBTQ digital and print media?
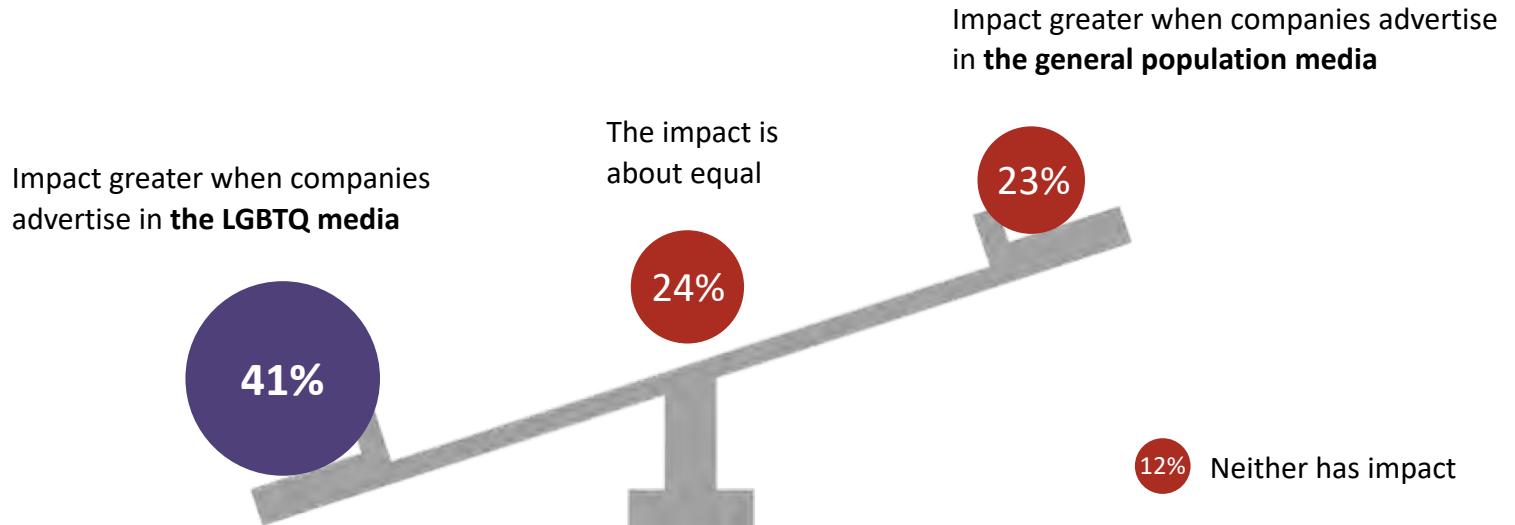
From the 2019 Report

Among All LGBTQ

Response	Percentage
Significantly more likely to purchase when they advertise in the LGBTQ media	27%
Somewhat more likely to purchase when they advertise in the LGBTQ media	45%
Has little influence on me	22%
Less likely to purchase when they advertise in the LGBTQ media	0.3%
I don't view LGBTQ media	7%

72% Are More Likely to Purchase

Base: All LGBTQ n=11,639
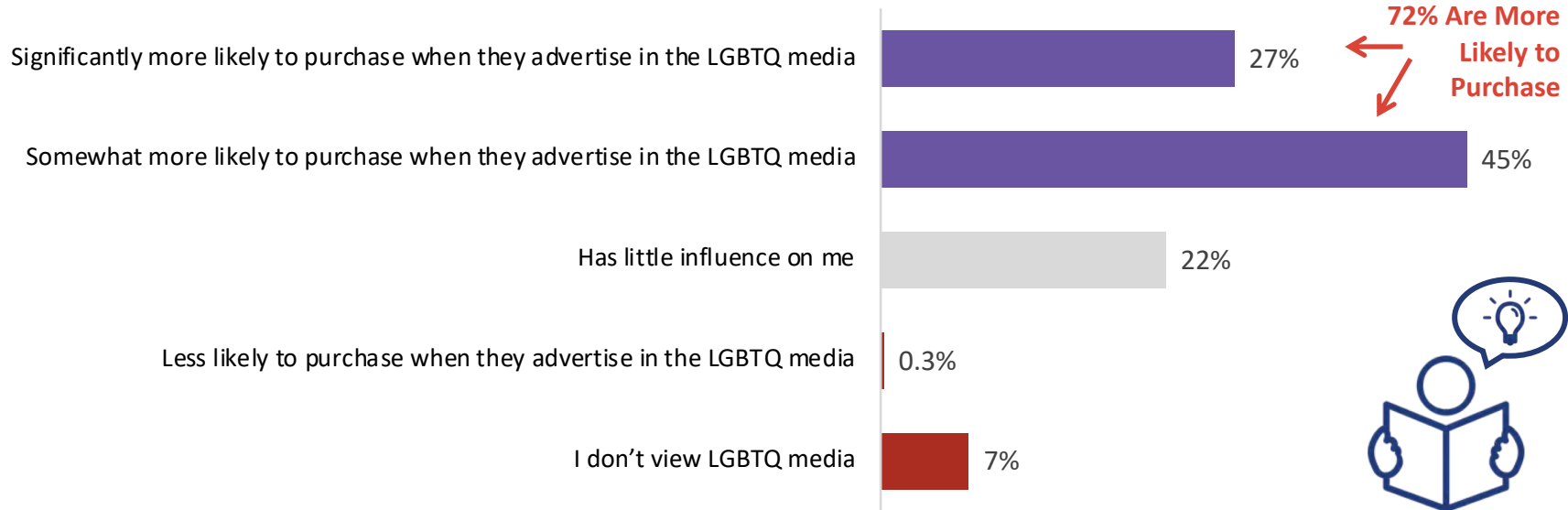
Impact of Advertising in the LGBTQ Media: Advertising in the LGBTQ media is more impactful to LGBTQ consumers than advertising in the general population media.

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

From the 2019 Report

Among All LGBTQ

Impact greater when companies advertise in **the general population media**

The impact is about equal

23%

Impact greater when companies advertise in **the LGBTQ media**

24%

41%

12% Neither has impact

Base: All LGBTQ n=11,639

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

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

From the 2019 Report　　　　　　**Among All LGBTQ**

42%	39%	3%	7%	8%
I trust the LGBTQ media more	I trust both about the same	I trust the general media more	I trust neither	Not sure

Base: All LGBTQ n=11,639
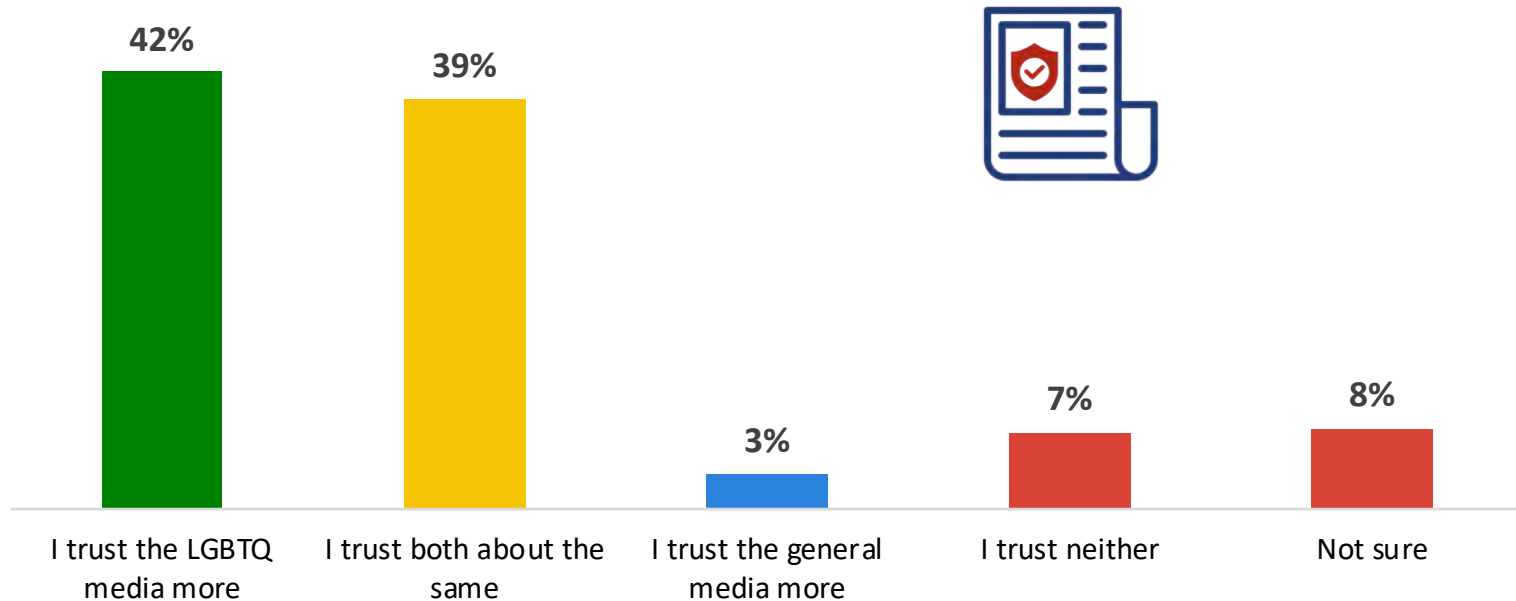
7

LGBTQ Consumer Purchasing

Electronics and Other Larger Home Purchases

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

	All LGBTQ	Millennials+	Generation X	Baby Boomers+
Smartphone	46%	44%	51%	44%
Article of clothing over $100	39%	38%	43%	37%
Laptop or desktop computer	29%	28%	32%	27%
Major piece of home furniture over $500	28%	26%	32%	26%
Tablet	19%	15%	22%	21%
Smart speaker	18%	19%	22%	14%
Smart Home system or device (for any home purpose)	17%	18%	19%	14%
Major kitchen appliance over $500	15%	9%	18%	18%
Gaming console	10%	19%	9%	2%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting)

Entertainment Purchases

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

	All LGBTQ	Millennials+	Generation X	Baby Boomesr+
Streaming television subscription (e.g. Netflix, Amazon Prime, Hulu)	82%	86%	85%	74%
A movie ticket at a theater	70%	76%	70%	65%
Cable internet	67%	59%	69%	73%
Subscription radio or paid music (e.g. SiriusXM, Pandora, Spotify, Apple Music)	52%	61%	54%	42%
Cable television (basic or with premium channels)	51%	29%	55%	69%
Live theatre or musical	51%	50%	51%	51%
Live music concert	47%	53%	50%	39%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting)

Beverage Purchases by LGBTQ Demographics

In the past 30 days, have you purchased any of these types of beverages in a store?
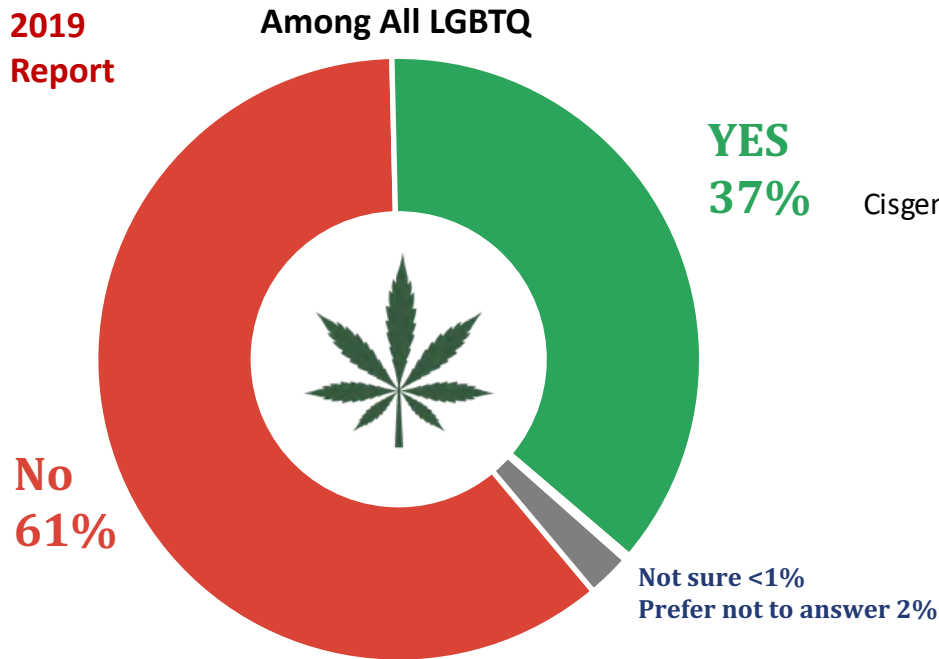### (Please mark all that apply.)

	All LGBTQ	Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Millennials+	Generation X	Baby Boomers+
Juice	54%	57%	51%	53%	53%	55%	53%
Bottled water (still)	48%	52%	46%	43%	42%	54%	50%
Sparkling/seltzer water (flavored or unflavored)	42%	43%	44%	34%	45%	42%	40%
Soda (non-diet)	37%	37%	37%	44%	42%	41%	29%
Tea or iced tea (pre-made on shelf at store)	36%	38%	33%	35%	35%	38%	34%
Coffee drinks (pre-made on shelf at store)	34%	36%	31%	34%	40%	35%	26%
Diet soda	33%	37%	31%	25%	26%	37%	37%
Sports drinks that rehydrate	28%	29%	27%	31%	31%	34%	20%
Protein drinks	18%	20%	15%	17%	17%	20%	16%
Energy drinks (other than coffee and tea)	16%	18%	14%	19%	22%	18%	8%
None of the above	7%	5%	7%	8%	8%	4%	7%

Base: All LGBTQ n=17,230 (See methodology for segment bases and weighting)

Alcohol Beverage Purchases by LGBTQ Demographics

In the past 30 days, what types of alcohol beverages have you purchased at a bar, restaurant or for home? (Please mark all that apply.)

	All LGBTQ Age 21 +	Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Millennials+	Generation X	Baby Boomers+
Wine (any type)	52%	56%	51%	41%	54%	52%	50%
Beer (any type)	45%	45%	46%	37%	49%	47%	39%
Vodka	32%	41%	25%	22%	33%	36%	27%
Bourbon or Whiskey	26%	31%	23%	22%	29%	29%	22%
Tequila	19%	22%	17%	15%	24%	19%	14%
Flavored malt beverage (like a hard lemonade or hard seltzer)	16%	15%	16%	15%	25%	17%	6%
Rum	14%	16%	12%	13%	16%	16%	10%
Gin	14%	17%	12%	10%	17%	14%	11%
Other type of alcohol	12%	12%	11%	11%	14%	12%	9%
I have not purchased alcohol beverages in the past 30 days	29%	26%	30%	37%	26%	27%	34%
Prefer not to answer	1%	1%	1%	1%	1%	0%	1%

Base: All LGBTQ Age 21+ n=17,159 (See methodology for segment bases and weighting)

Use of Cannabis/Marijuana

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

From the 2019 Report

Among All LGBTQ

YES 37%

No 61%

Not sure <1%
Prefer not to answer 2%

"Yes" Among…

Cisgender Gay & Bi+ Men	37%
Cisgender Lesbian & Bi+ Women	36%
Transgender & Non-binary Participants	41%
Millennials+	45%
Generation X	33%
Baby Boomers+	32%
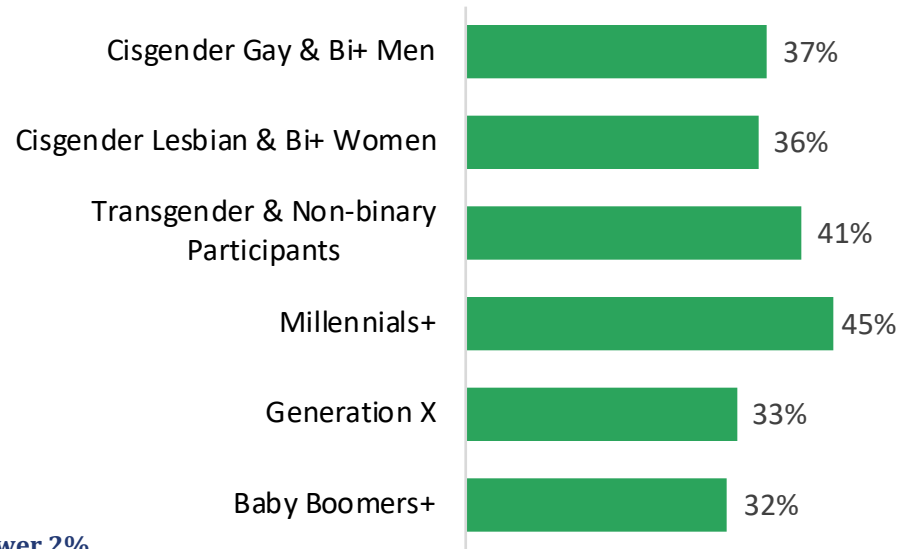
Base: All LGBTQ n=11,639

Skin Care Items Purchased

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

From the 2019 Report

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

Base: All LGBTQ n=11,639

Download These and Other Reports at No Charge at www.CMI.info

LGBTQ Auto Ownership
March 2020

LGBTQ Tourism & Hospitality Survey
December 2019

LGBTQ Consumer Products
January 1999

LGBTQ Health Survey Report
March 2019

COVID-19 and LGBTQ Travel
May 2020

FOR MORE INFORMATION:

CMI's highly specialized services are based on 25+ years of dedicated experience, producing LGBTQ market intelligence for leading corporate, university, government, and non-profit clients across the USA and around the world.

Serving a variety of industries and organizations, we leverage our in-house proprietary panel of nearly 50,000 community-representative LGBTQ consumers to produce consumer survey studies, focus groups, interviews, etc. Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBTQ research/sales/marketing/best practices corporate training and conference presentations.

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

- o Financial Outlook
- o Purchasing Behavior
- o Media Consumption
- o Living Environment
- o Terminology
- o LGBTQ Social / Peer Circles
- o Brand 'LGBTQ-friendliness'
- o Social Concerns
- o Technology
- o Segments Within LGBTQ

- o Travel Behavior
- o Motivations
- o Sports and Recreation
- o Social Media Habits
- o Product Categories
- o Custom Surveys, Focus Groups, In-Depth Interviews and other research methodologies

Community Marketing & Insights

LGBTQ, Inc.

145 Corte Madera Town Center #202

Corte Madera CA 94925 USA

Voicemail/Fax +1 (415) 343-4656

www.CMI.info   *@LGBTQInsights*

For more information, contact

David Paisley, Senior Research Director

david@CMI.info

Member

CMI Community Marketing & Insights
Leaders in LGBTQ Research since 1992

LGBTQ Research Panel 2020

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with over 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 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
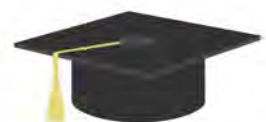
10%
LGBTQ Parents with a Child Under 18 Living at Home

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 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 25 years by partnering with over 300 LGBTQ media, organizations, events, social media and influencers throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is highly representative of LGBTQ consumers who interact with LGBTQ community organizations and media. Our panelists come from diverse sources, allowing for broad 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 14th 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 60+ 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 25+ years.

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

Community Marketing, Inc., founded in 1992, pioneered LGBTQ consumer research. Because our company is LGBTQ-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 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.