



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

15th Annual LGBTQ Community Survey[®]

USA Report | July 2021

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About CMI

25+ Years of LGBTQ Insights

Community Marketing & Insights (CMI) has been conducting LGBTQ community research since 1992.

CMI's practice includes online surveys, in-depth interviews, on-site and virtual focus groups, and LGBTQ recruitment assistance supporting LGBTQ research initiatives worldwide. Over the decades, we have completed more than 300 LGBTQ-specific research projects in support of businesses, corporations, universities, non-profits, government agencies, and other research groups. CMI maintains our own panel of 50,000 LGBTQ research participants. Our work is worldwide, with an emphasis on the United States, Canada, Mexico, and China. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, product development, informed forecasting, measurable marketing planning, and assessment of return on investment.

CMI's research clients include leaders from a wide range of industries.

Custom CMI research initiatives have been produced for these and many other clients: AARP, Absolut Vodka, Aetna Insurance, American Cancer Society, Argentina Tourism Office, AT&T, Centers for Disease Control & Prevention, CMI Media Group, Destination Canada, DIRECTV, Freddie Mac, Google, Hallmark, Hawai'i Tourism Authority, Human Rights Campaign Foundation, Johnson & Johnson, Kaiser Family Foundation, Las Vegas Convention & Visitors Authority, New York Life, NYC & Company, Planned Parenthood, Realtor.com, T. Rowe Price, Target Brands, TD Bank, U.S. Census Bureau, U.S. Housing & Urban Development, UPS, Visit Britain, Visit Lauderdale, Visit Salt Lake, Wells Fargo, Wilson Media Group, Inc., WNBA, and numerous other corporations and organizations across North America and around the world.

CMI's 15th ANNUAL LGBTQ COMMUNITY SURVEY RESEARCH PARTNERS

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

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In Partnership With



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#ILoveGay
A&U Magazine
Adelante
Atlanta Pride Committee
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Bay Area Reporter
Bay Windows
Bisexual Queer Alliance Chicago
boiMAGazine & boiMAG.com
CAMP Rehoboth Community Center
Center for Black Equity
CenterLink: The Community of LGBT Centers
CGLCC - Canada's LGBT+ Chamber of Commerce
ChicagoPride.com/GoPride
Circle of Voices Inc.
CityXtra Magazine
Connect Media
Connecticut Gay and Lesbian Chamber
Curve Magazine
Dallas Voice
Damron Travel Guides
DECORHOMME
Desert Business Association
EqualityMD
Equally Wed
Erie Gay News
EveryQueer
Fenuxe Magazine
Focus Magazine
FUGUES
Gay City News
Gay For Good
GayCalgary
GayCities
GayDesertGuide.LGBT
Gayvan.com Travel Marketing
GED Magazine
GEORGIA VOICE
GFLGCC | Greater Fort Lauderdale LGBT Chamber of Commerce
GLBT Historical Society

Goliath Magazine
GSBA
Harlem Pride
Harriet Hancock Center Foundation
Hawaii LGBT Legacy Foundation
Hep
Hotspots Media/WMEG
Illinois Eagle
In the Life Atlanta
Inside Out Film Festival
InterPride
ION Arizona Magazine
Las Vegas PRIDE
Lesbian.com
LGBT Meeting Professionals
LGBT+ Center Orlando, Inc.
LGBTQ Nation
LGBTQSurvey.com
Los Angeles Blade/Brown Naff Pitts Omnimedia, Inc.
Love Inc. Magazine
Metro Weekly
Metrosource
Miami Dade Gay and Lesbian Chamber of Commerce
Montrose Star
Motor City Pride
Muskoka Pride
Nashville LGBT Chamber
New Jersey LGBT Chamber of Commerce
nmg network
North Texas LGBT Chamber of Commerce
NQAPIA- National Queer Asian Pacific Islander Alliance
OMG.BLOG
ONE Community
OUT FRONT Magazine (OFM)
OUT Georgia Business Alliance
Out In Jersey Magazine
Out Professionals
OutClique Magazine
OutSmart Magazine
Palm Springs Community Leadership Council

PASSPORT Magazine
Peach Magazine
Persad Center
Philadelphia Gay News
Pink Media
POZ
Pride Center of Staten Island
Pride Center San Antonio
Pride Guide® USA
Pride Source Media/Between The Lines
Project MORE
Q Magazine Australia
Q Magazine Key West
Q Voice News
Q.Digital
QNotes / goqnotes.com
QSaltLake Magazine
Queerty
Rainbow Chamber Silicon Valley
Rainbow GUIDE Arc-en-ciel
Raynbow Affair Magazine
Real Health
San Francisco Bay Times / "Betty's List"
Seattle Gay News
South Florida Gay News | The Mirror Magazine
Squirt.org
Start Out
Tagg Magazine
The Academia Society, Inc.
The LGBTQ Community Center of the Desert
The Seattle Lesbian
The Standard Magazine
therepubliq.com
TransPonder
Tu Salud
Washington Blade/Brown Naff Pitts Omnimedia, Inc.
Watermark Publishing Group Inc.
Wisconsin LGBT Chamber of Commerce
Xtra Magazine



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

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Methodology

Methodology

Understanding the Results

Research participants were recruited through CMI's proprietary LGBTQ research panel and through our partnerships with over 100 LGBTQ media, events, and organizations. Because CMI has little control over the sample or response of the widely-distributed LGBTQ Community Survey, we do not profess that the results are representative of the "entire LGBTQ community." Instead, readers of this report should view results as a market study on LGBTQ community members who interact with LGBTQ media and organizations. CMI views these results as most helpful to readers who want to reach the community through LGBTQ advertising, marketing, events, and sponsorship outreach. Results do not reflect community members who are more closeted or do not interact much with LGBTQ community organizations. More than likely, bisexual community members are also underrepresented in the results.

Sample Size and Weighting

This report focuses on the data for **15,042 self-identified LGBTQ community members living in the United States**. This includes 9,338 cisgender gay and bi+ men, 3,829 cisgender lesbian and bi+ women, and 1,875 transgender and non-binary community members. **Overall, 23,000 respondents across the globe participated in the 2021 survey**, which was fielded in English, Spanish and French. The survey was open to participants for a 60-day period during May and June 2021.

LGBTQ media-based outreach tends to attract participants who trend older, male, better educated, and more Caucasian than might be expected compared to the overall LGBTQ community. **For this reason, results for the large study sample are weighted.** Despite the varying recruitment partners year-to-year, weighted results remain remarkably consistent on multi-year tracking questions, which is most likely due to the large sample size and like-minded outreach partners.

CMI's LGBTQ Community Survey strives for a reasonable balance of opinion. Results were weighted 30% age 18-34, 35% age 35-54, and 35% age 55 or older. The younger group has a 30% weight because of the fewer number of years in the age group. By gender, cisgender women were weighted at 44%, cisgender men at 44%, and transgender/non-binary (TGNB) participants at 12%. The weighting for transgender/non-binary participants was increased from 10% to 12% compared to last year, because CMI is observing increased numbers of TGNB participants in the research. By ethnicity, results were weighted 62% White or Caucasian, 15% Latino, Latina, Latinx or Hispanic, 13% Black or African American, 6% Asian or Pacific Islander, and 4% all other race and ethnicity categories.

Participant Profile

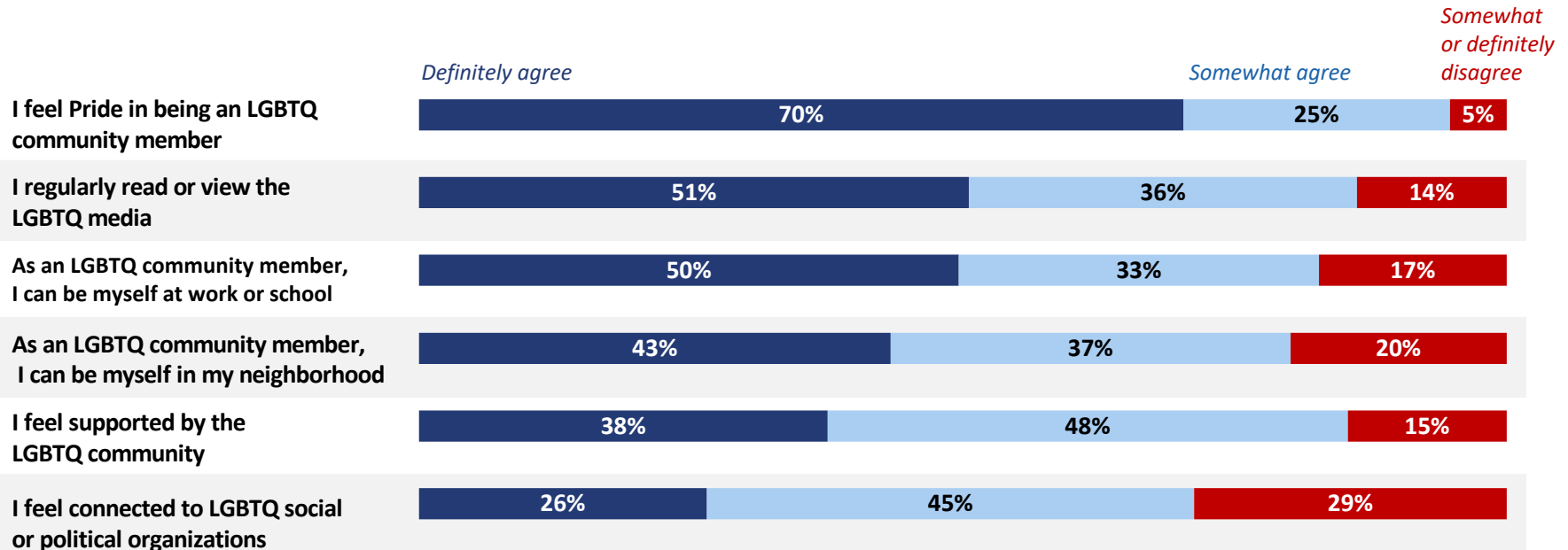
See previous slide for weighting assumptions

	Weighted Results		Unweighted Participants	
	# of Participants	Percentage	# of Participants	Percentage
All LGBTQ	15,042	100%	15,042	100%
Cisgender Lesbian & Bi+ Women	6,618	44%	3,829	25%
Cisgender Gay & Bi+ Men	6,618	44%	9,338	62%
Transgender & Non-Binary Participants	1,805	12%	1,875	12%
Age 18 to 34	4,513	30%	2,611	17%
Age 35 to 54	5,265	35%	4,931	33%
Age 55+	5,265	35%	7,500	50%
White or Caucasian	9,325	62%	11,333	75%
Black or African American	1,957	13%	1,068	7%
Latino, Latina, Latinx or Hispanic	2,256	15%	1,264	8%
Asian or Pacific Islander	900	6%	622	4%
Other Race or Ethnicity Combined for Weighting Purposes	605	4%	755	5%

Understanding the Research Participants

Because participants were recruited through LGBTQ media and organizations, they are likely to be “out” and connected to the greater LGBTQ community. This is evident by the response to the following six statements. Of note, while relatively few “disagree” with any of these statements, large percentages of participants “somewhat agree” rather than “definitely agree” with many of the statements.

Q: How much do you agree or disagree with these statements about being an LGBTQ community member?



Base: All LGBTQ n=15,001



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**Executive
Summary**

Key Findings

About the Research

- The report focuses on the data for 15,042 self-identified LGBTQ community members living in the United States. The data was weighted by gender identity, age, and ethnicity (see methodology). Research participants were recruited through CMI's proprietary LGBTQ research panel and through our partnerships with over 100 LGBTQ media, events, and organizations. CMI views these results as most helpful to readers who want to reach the community through LGBTQ advertising, marketing, events, and sponsorship outreach.

Power of LGBTQ Outreach Programs

- 79% of participants agree that they think more positively about companies that sponsor LGBTQ community organizations and events.
- 74% of participants agree that they are more likely to purchase from a company that outreaches and advertises to the LGBTQ community.
- 73% of participants agree that they think more positively about companies that advertise in the LGBTQ media. And, 86% agreed that they regularly read or view the LGBTQ media.
- 70% of participants agree that LGBTQ-supportive companies have made a positive difference for their LGBTQ employees.

- In contrast to the percentages for the previous statements, 58% of participants agree that corporate presence at LGBTQ Pride events is positive for the community, 27% were neutral, and 16% disagreed. While still very positive, the lower percentage may reflect that some in the community are reassessing the level of corporate involvement in Pride. Pride organizations and sponsoring corporations need to better communicate that Pride corporate sponsors *authentically support* the LGBTQ community.

LGBTQ Demographics

- LGBTQ relationship status and the percent married have not significantly changed since last year. In reviewing CMI's LGBTQ Community Survey® data over the previous four years, LGBTQ marriage rates appear stable, increasing by just a couple of percentage points. We are in a period where the numbers of new marriages vs. new divorces or the death of a partner are at a near equilibrium.

Key Findings

- Cisgender gay and bi+ men are far more likely to be single than are cisgender lesbian and bi+ women (and cisgender lesbian and bi+ women are more likely to be married). Cisgender gay and bi+ men are far more likely to be single than are cisgender lesbian and bi+ women (and cisgender lesbian and bi+ women are more likely to be married). This has important implications because relationship status strongly influences everyday living and related decisions, including health, wellness, and purchasing.
- There are more LGBTQ parents than many might think. In this study, 23% of LGBTQ participants have a child of any age. Lesbian & bi+ women are the most likely in the LGBTQ community to have children under age 18. There is also a substantial percentage of transgender and non-binary parents. Since the 2017 report, we have not seen significant increases in LGBTQ parent percentages. In that report, about half of LGBTQ Millennials were interested in becoming parents. More programs are needed to support these community members' family goals.
- For the first time, the survey asked about the use of personal pronouns. While differences in pronoun use were most pronounced by gender identity, age also mattered. Sixteen percent (16%) of participants under age 35 used "they/them/theirs," compared to 4% of participants over age 55.

Living in LGBTQ-friendly Communities

- LGBTQ survey participants live in a wide variety of community types. While cisgender gay and bi+ men have a higher likelihood of living in big cities, only 40% live in big city environments. Cisgender lesbian and bi+ women, transgender, and non-binary participants were more dispersed, living in many different community types.
- As an annual question, we were able to look at past data to see if COVID-19 caused a major shift in living environments. All data were within a percentage point or two compared to both the 2020 and 2017 results. We are not seeing a large LGBTQ migration to smaller-sized communities.
- The more urban the area, the more LGBTQ-friendly the community is considered to be. Ninety-six percent (96%) of LGBTQ participants think that their big city urban environments are LGBTQ-friendly, compared to 49% of those living in rural areas. CMI has been asking this question for a number of years. The biggest change we have seen over time is that LGBTQ community members are finding the suburbs more and more LGBTQ-friendly. Smaller increases are also noted for small towns and rural areas.

Key Findings

Terminology

- The real story of this year's results is momentum. Last year in our annual poll about community-preferred terminology, LGBTQ had overtaken LGBT as the favored term to describe our community. While the same is true this year, LGBTQ, LGBT, and LGBTQ+ are viewed similarly. However, the overall positive rating for LGBTQ and LGBT fell a little in the 2021 response, while LGBTQ+ increased 9%. This is an indication that LGBTQ+ has positive momentum.

Health and COVID-19

- The survey asked a broad question about sixteen potential health concerns. Of note was the considerable concern around LGBTQ mental health issues. Sleep and body weight concerns were also commonly mentioned across most demographics. COVID-19 was a big concern for all right now (for obvious reasons).
- COVID-19 has negatively impacted everyone. For some, the impact was from illness or the death of a loved one. However, for most of the LGBTQ community, isolation and mental health were significant adverse impacts. This might be especially problematic within the LGBTQ community because many were already experiencing isolation before the pandemic.
- At the time of the survey, the vast majority of LGBTQ participants reported having received at least one vaccination for COVID-19 (92%). There was some reduction in vaccination rates for the Black LGBTQ community, but still relatively high (85%). There are many reasons why LGBTQ vaccination rates may be higher than the general population, including higher percentages of the LGBTQ community being liberal, living in blue states, and living in urban areas. While participants had strong education levels, those with no more than a high school diploma still had an 87% vaccination rate. Many in the LGBTQ community may have more experience with medical science through education, workplaces, or other personal medical concerns. In addition, COVID isolation significantly impacted LGBTQ people, which may have motivated quick vaccination to reenter the community.
- The popularity of vaping complicates tobacco use history and prevention programs. The study shows a higher use of vaping vs. smoking tobacco among young LGBTQ participants. Among all study participants, 17% smoked tobacco or vaped.

Key Findings

Workplaces

- In general, LGBTQ community members feel that their employer is LGBTQ-friendly (81% supportive). The high percentage may be a function of LGBTQ employees seeking work at LGBTQ-friendly companies.
- However, when asked if the company supports their transgender and non-binary employees, the percentage falls (56% supportive). Of note was that 17% of all LGBTQ participants were not sure if their employer was trans-supportive. When transgender and non-binary employees were asked about their employer, 62% indicated that they work for a supportive company, 24% were neutral or unsure, and 14% unsupportive.

Economy

- In general, the LGBTQ community is optimistic that the upcoming year will be better than the past year. Compared to last year's survey, the future year optimism increased 11%.



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Impact of Outreach to the LGBTQ Community

“LGBTQ-supportive companies have made a positive difference for their LGBTQ employees.”



70% Agree

28% Neutral

2% Disagree

Q: Do you agree or disagree with the following statements about corporate involvement in the LGBTQ community...?
All LGBTQ n=14,973

“I think more positively about companies that advertise in the LGBTQ media.”



73% Agree

23% Neutral

4% Disagree

“I regularly read or view the LGBTQ media.”



86% Agree

14% Disagree

Q: How much do you agree or disagree with these statements about being an LGBTQ community member?
All LGBTQ n=14,980

“I am more likely to purchase from a company that outreaches and advertises to the LGBTQ community.”



74% Agree

22% Neutral

4% Disagree

Q: Do you agree or disagree with the following statements about corporate involvement in the LGBTQ community...?
All LGBTQ n=14,992

“I think more positively about companies that sponsor LGBTQ community organizations and events.”



79% Agree
18% Neutral
4% Disagree

“I feel connected to LGBTQ social or political organizations.”



71% Agree

29% Disagree

Q: How much do you agree or disagree with these statements about being an LGBTQ community member?
All LGBTQ n=14,977

“Corporate presence at LGBTQ Pride events is positive for the community.”



58% Agree

27% Neutral

16% Disagree



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**LGBTQ
Demographics**

Relationship Status

Relationship status and the percent married in the LGBTQ community have not significantly changed since last year. In reviewing the Community Survey data over the previous four years, LGBTQ marriage rates appear stable, increasing by just a couple of percentage points. We are in a period where the numbers of new marriages vs. new divorces or the death of a partner are at a near equilibrium. As indicated in CMI's previous research, gay and bi+ men are far more likely to be single than are lesbian and bi+ women. This has important implications because relationship status strongly influences everyday living and related decisions, including health, wellness, and purchasing.

Q: Which of the following best describes your current relationship status?

We know relationships may be complex, please mark the best response.

	Cisgender Lesbian & Bisexual Women	Cisgender Gay & Bisexual Men	Transgender and Non-Binary Participants
Single / not in a relationship (includes divorced and death of spouse)	33%	43%	40%
In a relationship but not living with a partner	8%	9%	9%
In a relationship and living with a partner (no legal status)	14%	15%	11%
Legally married	38%	27%	27%
Civil union, registered domestic partner or common law	2%	2%	1%
Engaged	3%	2%	3%
Polyamorous relationship	2%	1%	6%
Other	1%	1%	3%

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. Others may be in a polyamorous relationship. Marketers and employers should avoid making relationship or terminology assumptions; instead, we should use inclusive terminology.

Q: You indicated that you are in a relationship. How would you describe your relationship? (Please mark all 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%	23%
Male same-sex couple (male-male couple)	95%	--	13%
Opposite-sex couple (female-male couple)	5%	13%	20%
Non-binary / Transgender couple (where one or both partners identifies as transgender or outside the gender binary)	1%	6%	54%
Queer couple (any gender)	3%	14%	34%
Polyamorous relationship	2%	2%	7%
Other	<1%	1%	3%

LGBTQ Parents

There are more LGBTQ parents than many might think. In this study, 23% of LGBTQ participants have a child of any age. Lesbian & bi+ women are the most likely in the LGBTQ community to have children under age 18. There is also a substantial percentage of transgender and non-binary parents. Since the 2017 report, we have not seen significant increases in LGBTQ parent percentages. In that report, about half of LGBTQ Millennials were interested in becoming parents. More programs are needed to support these community members' family goals.

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

	All LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender and Non-Binary Participants
Parents (children of any age)	23%	31%	12%	31%
Yes, I have children under age 18 living in my home	8%	13%	3%	8%
Yes, I have children under age 18 not living in my home	1%	1%	1%	2%
Yes, I have children age 18 or over	12%	15%	7%	19%
Prefer not to answer	1%	1%	1%	1%

Many LGBTQ Baby Boomers are grandparents. Older LGBTQ community members often became parents before coming out. The LGBTQ grandparent market is often overlooked.

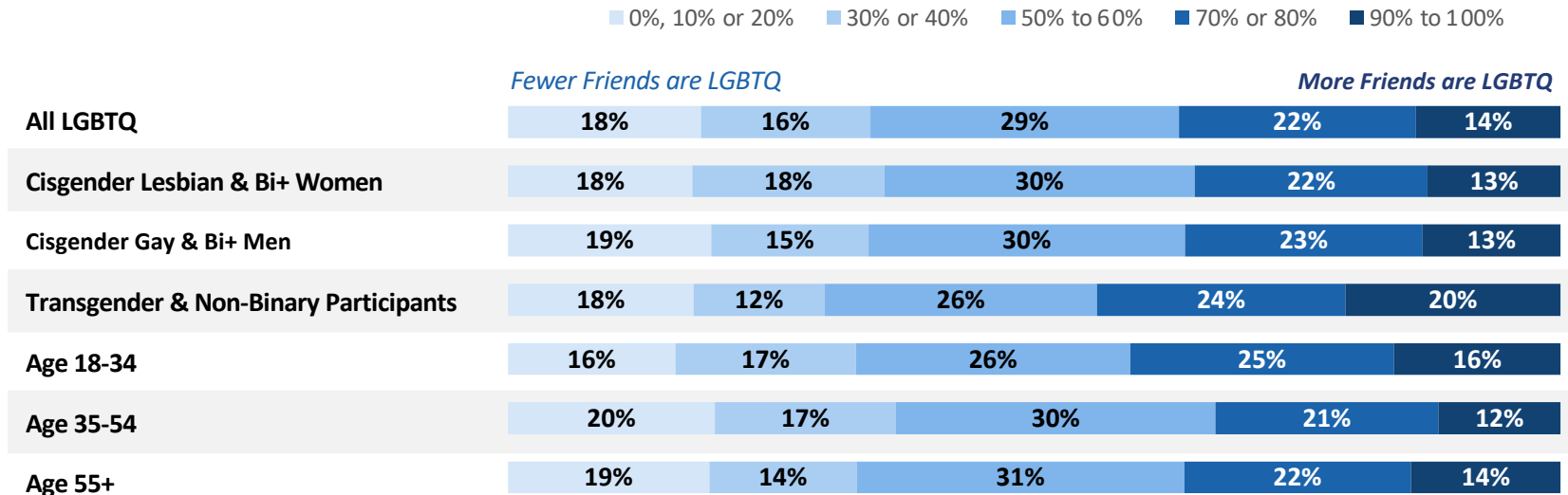


19%
of Baby Boomers+
Have Grandchildren

LGBTQ vs. Non-LGBTQ Friends

We were curious about the distribution of LGBTQ and non-LGBTQ friends among study participants, and if age or gender identity changed that distribution. The overall response was evenly distributed on the percentage scale. Further, gender identity and age group did not radically change the distribution. However, there was a somewhat higher percentage of LGBTQ friends for transgender and non-binary participants.

Q: When you think about your circle of friends, approximately what percentage do you think are part of the LGBTQ community?





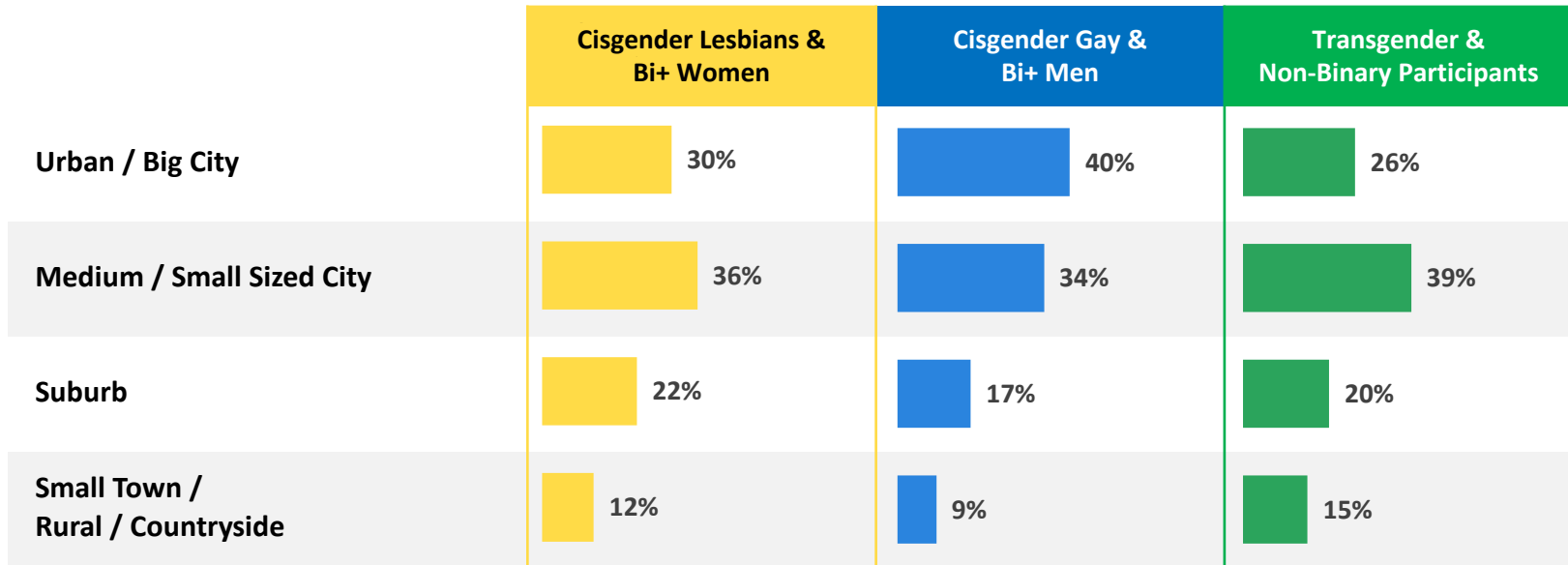
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**Living in
LGBTQ-friendly
Communities**

Type of Living Environment

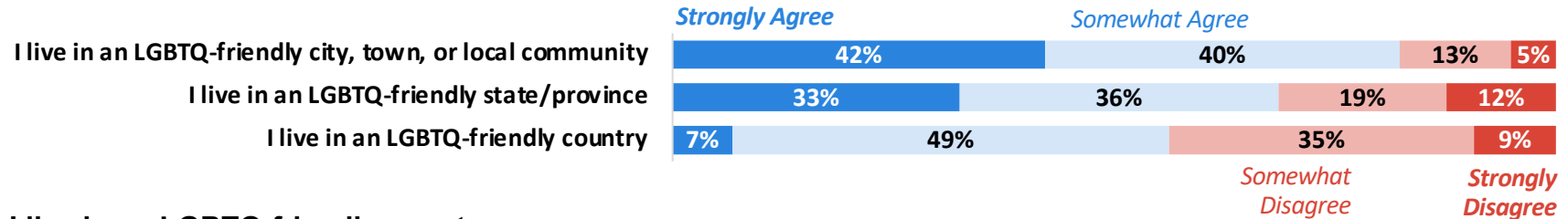
LGBTQ survey participants live in a wide variety of community types. While cisgender gay and bi+ men have a higher likelihood of living in big cities, only 40% live in big city environments. Cisgender lesbian and bi+ women, transgender, and non-binary participants were more dispersed, living in many different community types. As an annual question, we were able to look at past data to see if COVID-19 caused a major shift in living environments. All percentages were within a percentage point or two compared to both the 2020 and 2017 data. We are not seeing a large LGBTQ migration to smaller-sized communities.

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



LGBTQ-Friendly Living Environments

The more urban the area, the more LGBTQ-friendly the community is considered to be. Ninety-six percent (96%) of LGBTQ participants think that their big city urban environments are LGBTQ-friendly, compared to 49% of those living in rural areas. CMI has been asking this question for a number of years. The biggest change we have seen is that LGBTQ community members are finding suburbs to be more and more LGBTQ-friendly over time. Smaller increases are also noted for small towns and rural areas. This could be partially because LGBTQ people are selecting known LGBTQ-friendly areas in which to live.



I live in an LGBTQ-friendly country

Agreed by Country 56% of **USA residents** agreed -- 96% of **Canadian residents** agreed

I live in an LGBTQ-friendly state

Agreed by State **California** 99% agreed -- **New York** 97% agreed -- **Illinois** 92% agreed
Florida 43% agreed -- **Georgia** 33% agreed -- **Texas** 22% agreed

I live in an LGBTQ-friendly city, town or local community

Agreed by Type of Community

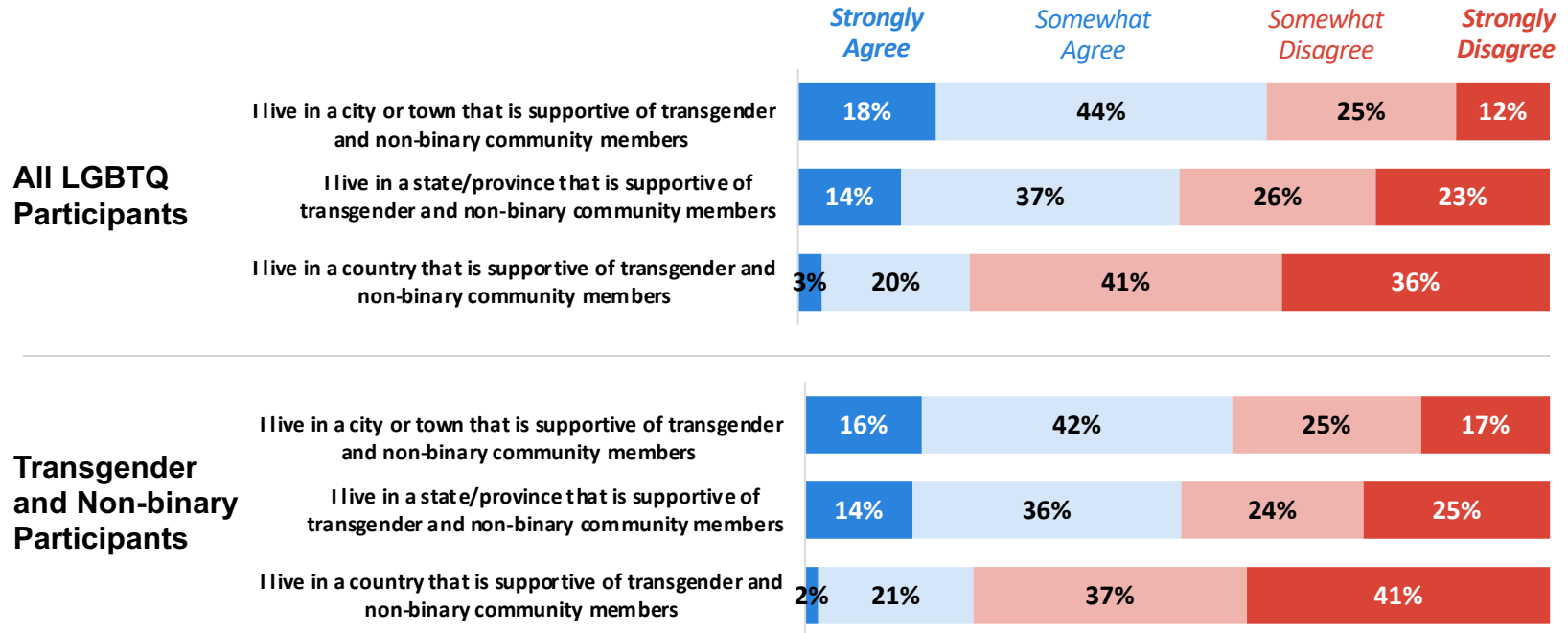
- Urban / Big city** 96% agreed
- Urban / Medium-sized city** 88% agreed
- Small city** 77% agreed
- Suburb** 78% agreed
- Small town** 60% agreed
- Rural area** 49% agreed

All LGBTQ n=15,042
 See methodology for segment bases.

Transgender-Friendly Living Environments

Most study participants feel that their local communities are more supportive of the transgender community than their state or country. The response from all LGBTQ participants and transgender/non-binary (TGNB) participants has a similar pattern.

Q: Do you agree or disagree with these statements?



Pronouns

For the first time, the survey asked about the use of personal pronouns. Because participants could select any that apply, many selected multiple options. While differences in pronoun use were most pronounced by gender identity, age also mattered. Sixteen percent (16%) of participants under age 35 used “they/them/theirs,” compared to 4% of participants over age 55.

**Q: We want to better understand pronoun use in the LGBTQ community. Which are your pronouns?
Please include any that apply for you.**

	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants
She / Her / Hers	93%	1%	45%
He / Him / His	1%	91%	33%
They / Them / Theirs	7%	4%	39%
I change my pronoun use depending on the situation	2%	2%	16%
No pronoun, please use my name	5%	7%	5%
Something else	1%	1%	4%
Prefer not to answer or Does not apply to me	1%	1%	1%

Additional pronoun selections that received 1% or less among each gender and age group.

*Ey / Em / Eir,
Ze / Hir / Hirs,
Ze / Zir / Zirs, and
Xe / Xem / Xyrs*

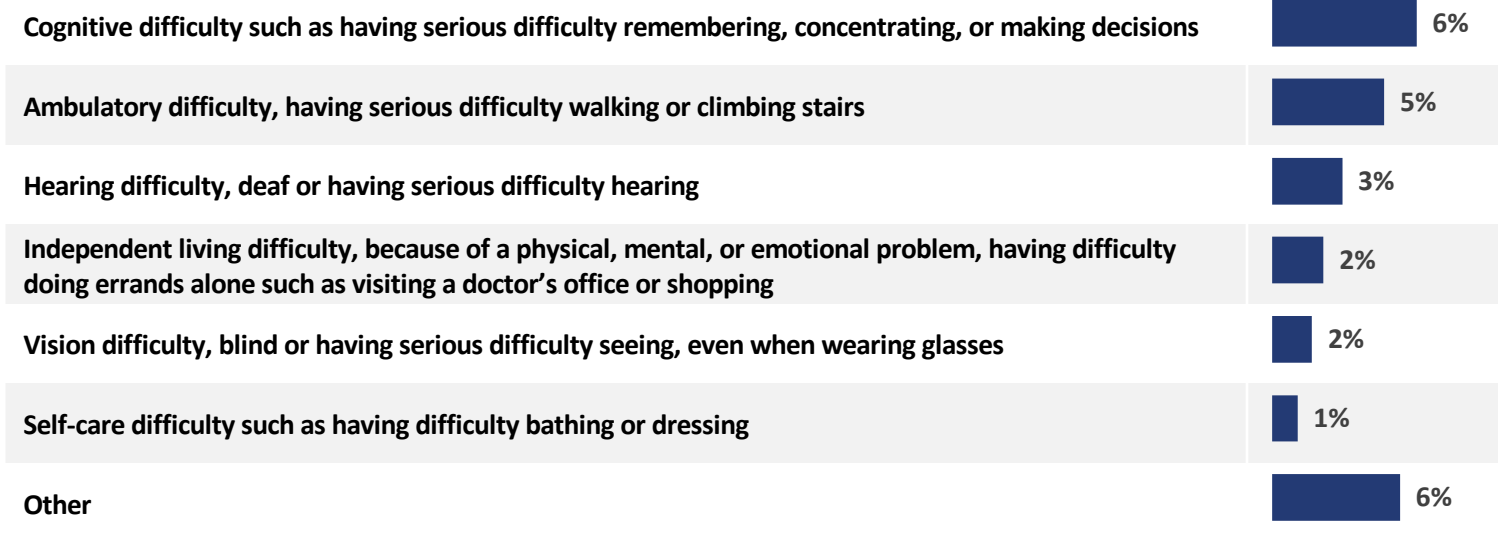
Disabilities

Q: Do you have any type of disability or learning difficulty?

19% of all LGBTQ participants surveyed indicated having a disability or learning difficulty.

Q: Please indicate the type of disability or learning difficulty.

**% Among All
LGBTQ Participants**





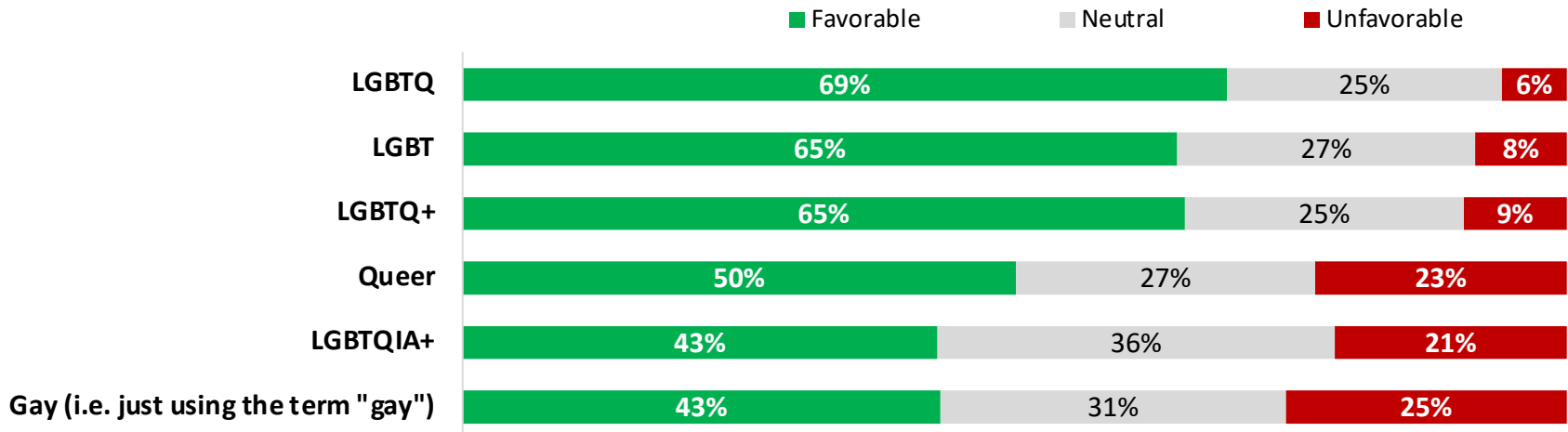
6

Terminology within the LGBTQ Community

Terminology within the LGBTQ Community

Last year in our annual poll about community terminology, LGBTQ had overtaken LGBT as the preferred term to describe our community. While the same is true this year, LGBTQ, LGBT, and LGBTQ+ are viewed similarly. The real story of this year's results is momentum. The overall positive rating for LGBTQ and LGBT fell a little in the 2021 response, while LGBTQ+ increased 9%. This is an indication that LGBTQ+ has positive momentum. CMI feels that based on trends over the past few years, LGBTQ or LGBTQ+ should be used today, while just LGBT has lost favorability over time. There is still resistance to increasing the alphabet to LGBTQIA+ in the United States (although often used in other countries).

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...



All LGBTQ n=14,856
 See methodology for segment bases.

Terminology within the LGBTQ Community by Demographic

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...

Gender and age groups within the LGBTQ community have different opinions about these terms.

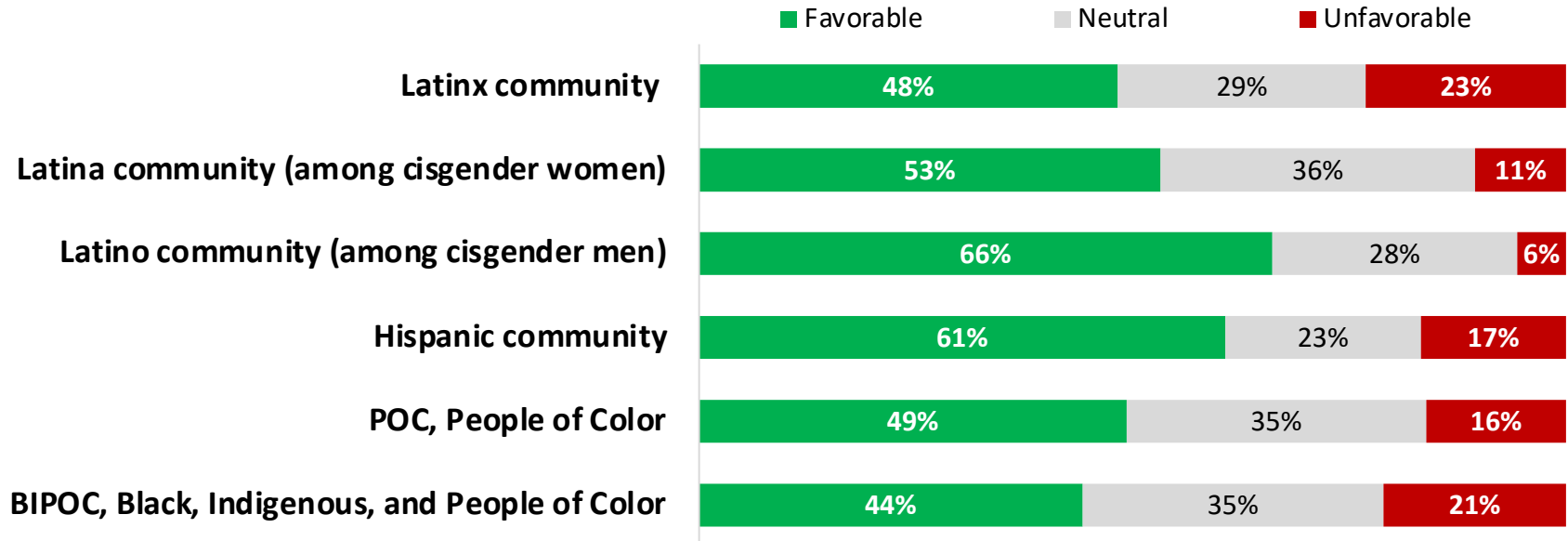
		Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Age 18 to 34	Age 35 to 54	Age 55+
LGBT	Favorable	72%	61%	53%	53%	63%	76%
	Neutral	22%	30%	34%	35%	28%	19%
	Unfavorable	6%	9%	13%	12%	9%	4%
LGBTQ	Favorable	67%	73%	65%	68%	69%	71%
	Neutral	26%	22%	30%	27%	25%	23%
	Unfavorable	7%	5%	6%	5%	6%	6%
LGBTQ+	Favorable	59%	72%	68%	75%	67%	56%
	Neutral	28%	22%	27%	20%	24%	32%
	Unfavorable	13%	7%	5%	6%	9%	13%
Queer	Favorable	39%	58%	61%	64%	50%	38%
	Neutral	30%	24%	25%	22%	27%	31%
	Unfavorable	31%	17%	14%	14%	22%	31%

All LGBTQ n=14,856
See methodology for segment bases.

Terminology within the LGBTQ Community

Among LGBTQ Participants Identifying as Latino, Latina, Latinx, or Hispanic

Q: The following terms are often used to describe communities. 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...

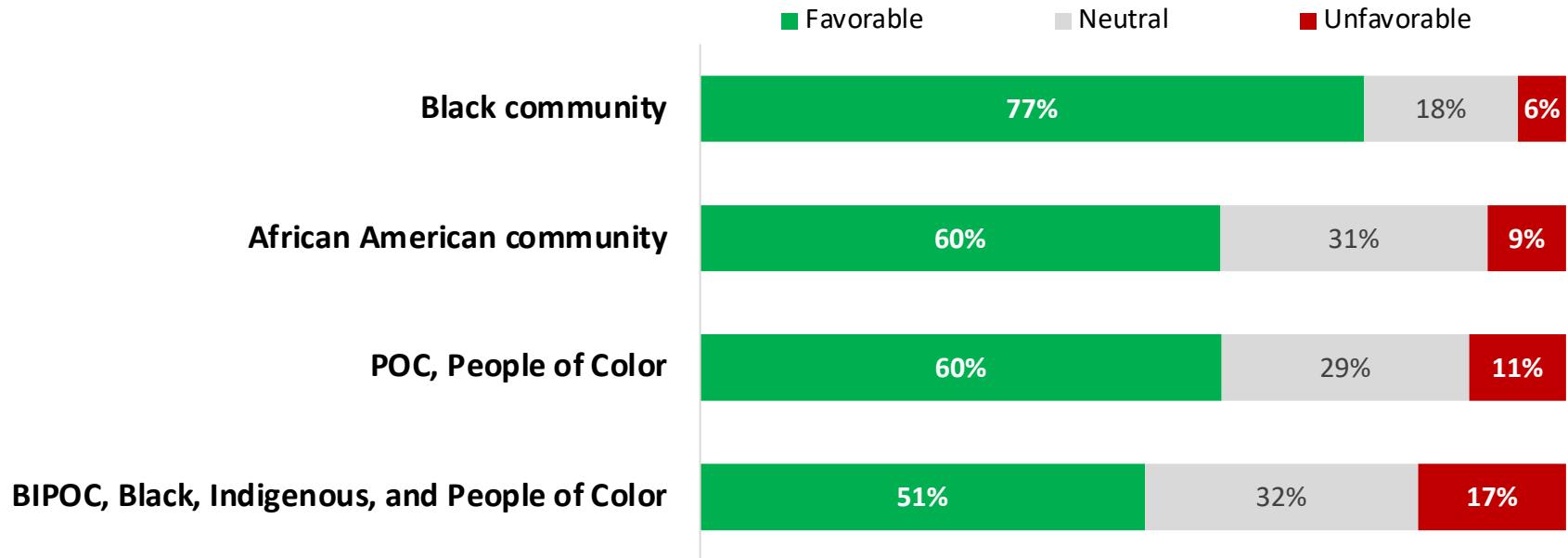


Base: n=1,265

Terminology within the LGBTQ Community

Among LGBTQ Participants Identifying as Black or African American

Q: The following terms are often used to describe communities. 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...

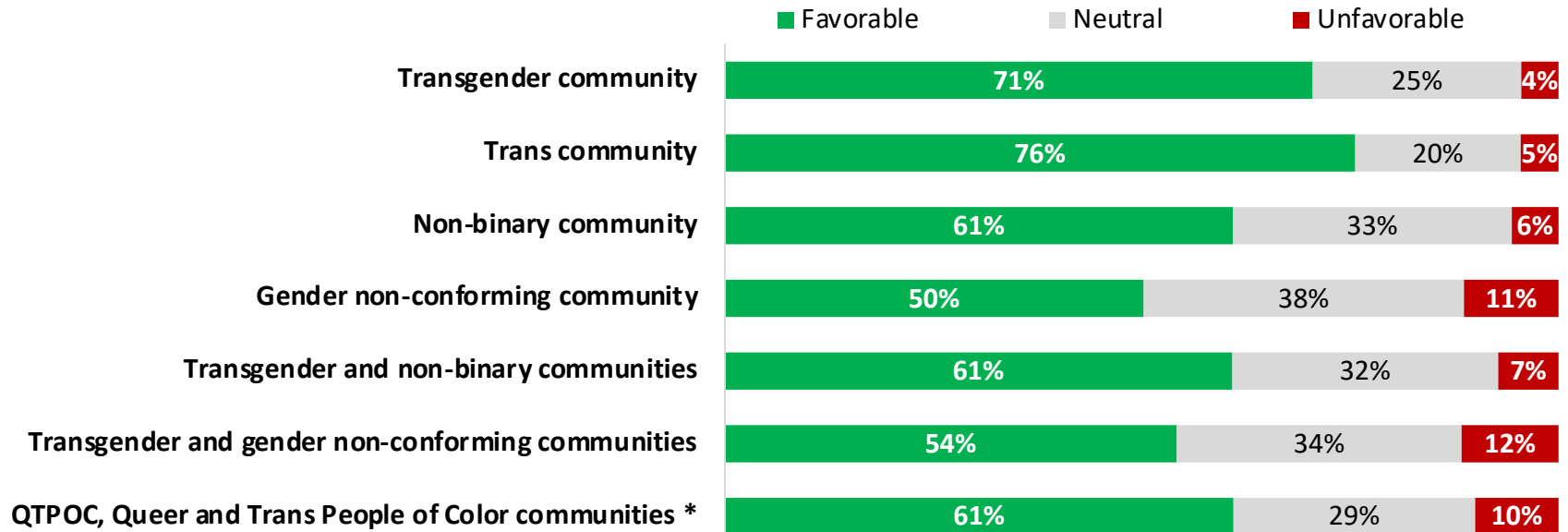


Base: n=1,068

Terminology Within the LGBTQ Community

Among Participants Identifying as **Transgender or Non-binary**

Q: The following terms are often used to describe communities. 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...



**Among Black and Latinx TGNB participants*

Base: n=1,875



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**LGBTQ
Health**

Most Important LGBTQ Community Health Concerns

The survey asked a broad question about sixteen potential health concerns. Because health is gender and age-specific, we listed the top concerns by demographic group.

Q: Please mark the health issues that are of the greatest concern to you. This may be because you are currently dealing with the health concern or perhaps you worry because of test results, family history or activities that put you at risk.

- Depression, anxiety or other mental health concern
- Getting gender confirmation surgery
- Getting to a healthy body weight
- Managing chronic pain
- Preventing or treating Alzheimer's or dementia
- Preventing or treating asthma or respiratory diseases
- Preventing or treating cancer (of any type)
- Preventing or treating COVID-19
- Preventing or treating diabetes
- Preventing or treating heart disease, stroke or high blood pressure
- Preventing or treating HIV
- Preventing or treating liver or kidney diseases
- Preventing or treating sexually transmitted infections
- Reducing or treating substance use (of any type)
- Sleep issues or improving sleep
- Starting, maintaining or access to gender-affirming hormone therapy

Cisgender Gay and Bi+ Men

Age 18 to 34

Depression, anxiety or other mental health concern	74%
Getting to a healthy body weight	57%
Preventing or treating HIV	53%
Sleep issues or improving sleep	45%
Preventing or treating sexually transmitted infections	45%
Preventing or treating COVID-19	44%

Age 35 to 54

Depression, anxiety or other mental health concern	61%
Getting to a healthy body weight	60%
Preventing or treating HIV	51%
Preventing or treating COVID-19	47%
Sleep issues or improving sleep	43%
Preventing or treating heart disease, stroke or high blood pressure	42%
Preventing or treating cancer (of any type)	37%
Preventing or treating sexually transmitted infections	37%

Age 55+

Preventing or treating heart disease, stroke or high blood pressure	54%
Getting to a healthy body weight	54%
Preventing or treating COVID-19	52%
Preventing or treating HIV	47%
Depression, anxiety or other mental health concern	47%
Preventing or treating cancer (of any type)	42%
Preventing or treating Alzheimer's or dementia	39%
Sleep issues or improving sleep	37%
Preventing or treating diabetes	36%
Managing chronic pain	28%
Preventing or treating sexually transmitted infections	27%

All LGBTQ n=14,895

See methodology for segment bases

Most Important LGBTQ Community Health Concerns

Age 18 to 34		Age 35 to 54		Age 55+	
Cisgender Lesbian and Bi+ Women		➔		➔	
Depression, anxiety or other mental health concern	87%	Depression, anxiety or other mental health concern	73%	Getting to a healthy body weight	58%
Preventing or treating COVID-19	53%	Getting to a healthy body weight	58%	Depression, anxiety or other mental health concern	52%
Sleep issues or improving sleep	47%	Preventing or treating COVID-19	44%	Preventing or treating heart disease, stroke or high blood pressure	49%
Getting to a healthy body weight	41%	Sleep issues or improving sleep	43%	Preventing or treating COVID-19	46%
Preventing or treating cancer (of any type)	26%	Preventing or treating cancer (of any type)	35%	Managing chronic pain	41%
Managing chronic pain	25%	Managing chronic pain	34%	Preventing or treating cancer (of any type)	40%
		Preventing or treating heart disease, stroke or high blood pressure	32%	Sleep issues or improving sleep	40%
				Preventing or treating Alzheimer's or dementia	37%
				Preventing or treating diabetes	31%
Transgender & Non-Binary Participants		➔		➔	
Depression, anxiety or other mental health concern	90%	Depression, anxiety or other mental health concern	77%	Depression, anxiety or other mental health concern	64%
Starting, maintaining or access to gender-affirming hormone therapy	52%	Getting to a healthy body weight	54%	Getting to a healthy body weight	56%
Preventing or treating COVID-19	51%	Preventing or treating COVID-19	51%	Preventing or treating heart disease, stroke or high blood pressure	47%
Sleep issues or improving sleep	50%	Starting, maintaining or access to gender-affirming hormone therapy	48%	Preventing or treating COVID-19	41%
Getting gender confirmation surgery	46%	Sleep issues or improving sleep	47%	Starting, maintaining or access to gender-affirming hormone therapy	40%
Getting to a healthy body weight	37%	Getting gender confirmation surgery	41%	Sleep issues or improving sleep	39%
Managing chronic pain	34%	Managing chronic pain	37%	Preventing or treating cancer (of any type)	35%
				Managing chronic pain	35%

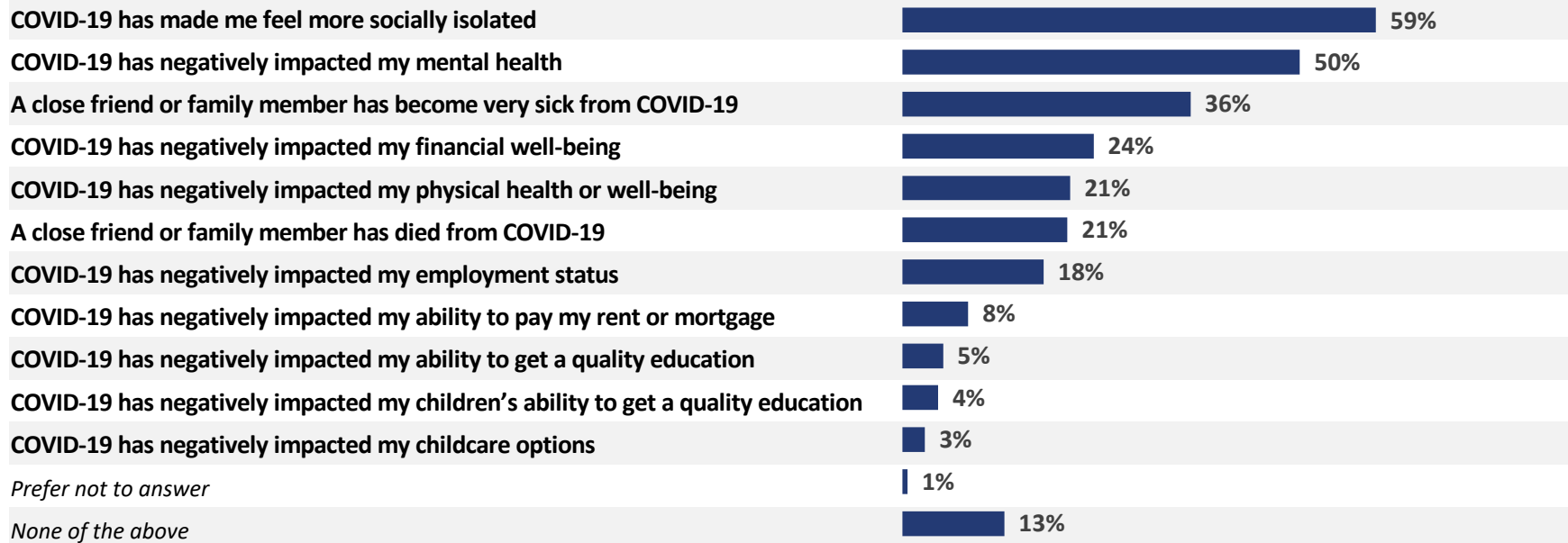
All LGBTQ n=14,895, see methodology for segment bases

Impact of COVID-19

COVID-19 has negatively impacted everyone. For some, the impact was from illness or the death of a loved one. However, for most of the LGBTQ community, isolation and mental health were significant adverse impacts. This might be especially problematic within the LGBTQ community as many were experiencing isolation before the pandemic.

Q: How has the COVID-19 pandemic impacted you? Please mark all that apply.

% Among All LGBTQ Participants

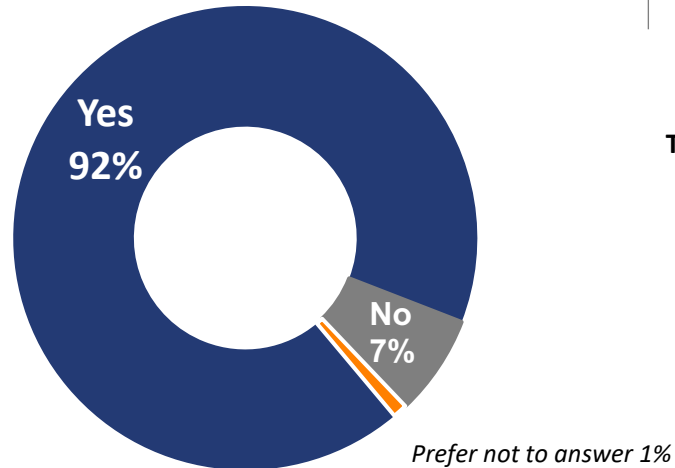


COVID-19 Vaccination

At the time of the survey, the vast majority of LGBTQ participants reported having received at least one vaccination for COVID-19 (92%). There was some reduction in vaccination rates for the Black LGBTQ community, but still relatively high (85%). There are many reasons why LGBTQ vaccination rates may be higher than the general population, including higher percentages of the LGBTQ community being liberal, living in blue states, and living in urban areas. While participants had strong education levels, those with no more than a high school diploma still had an 87% vaccination rate. Many in the LGBTQ community may have more experience with medical science through education, workplaces, or other personal medical concerns. In addition, COVID isolation significantly impacted LGBTQ people, which may have motivated quick vaccination to reenter the community.

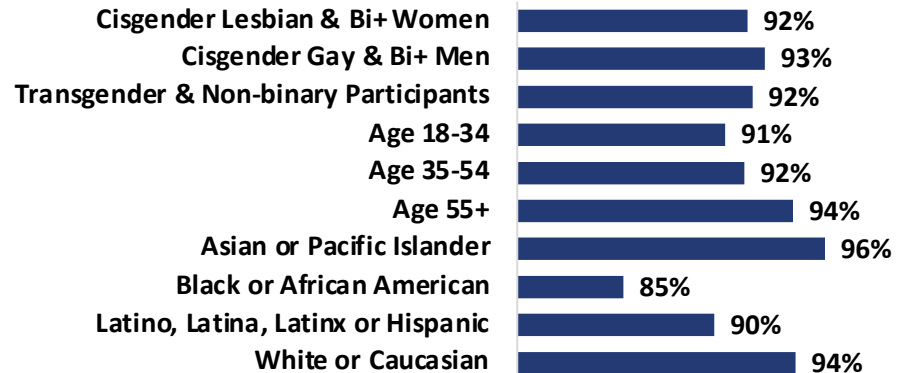
Q: Have you received your vaccine for COVID-19?

All LGBTQ



All LGBTQ n=15,042
See methodology for segment bases.

Vaccinated, by Demographic

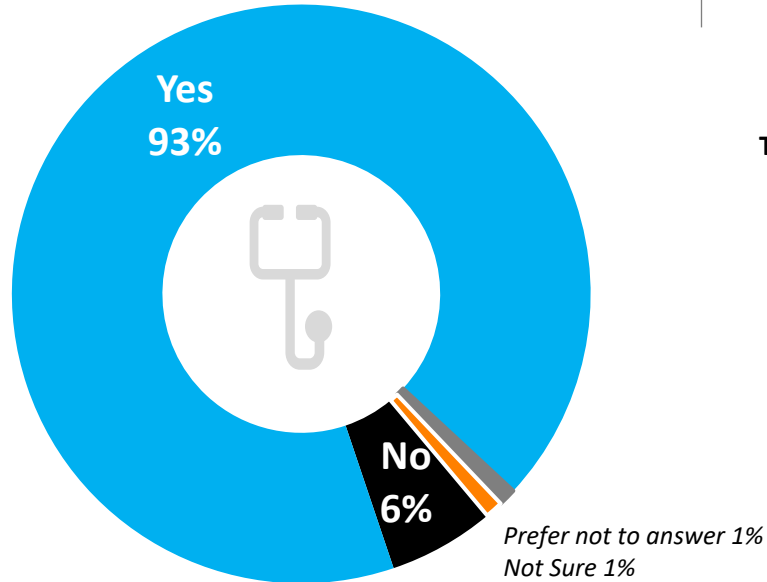


Health Coverage

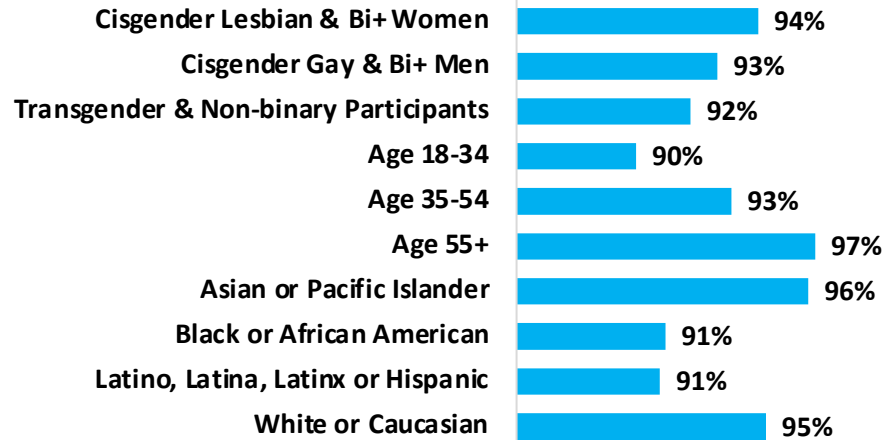
The vast majority of LGBTQ participants report having some type of healthcare coverage. Ten percent (10%) of participants under age 35 reported not being covered.

Q: Do you have any kind of health care coverage, including health insurance, prepaid health plans, HMOs, or government plans such as Medicare, or Indian Health Service?

All LGBTQ



Coverage by Demographic



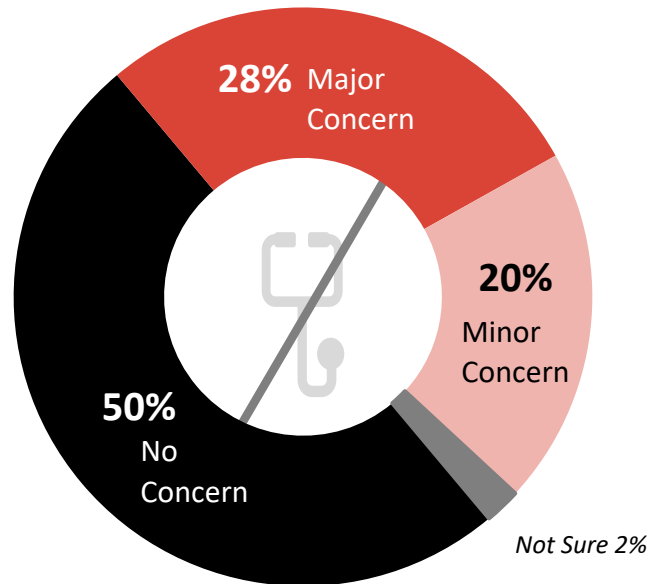
All LGBTQ n=15,042
See methodology for segment bases

Concerns About Losing Health Coverage

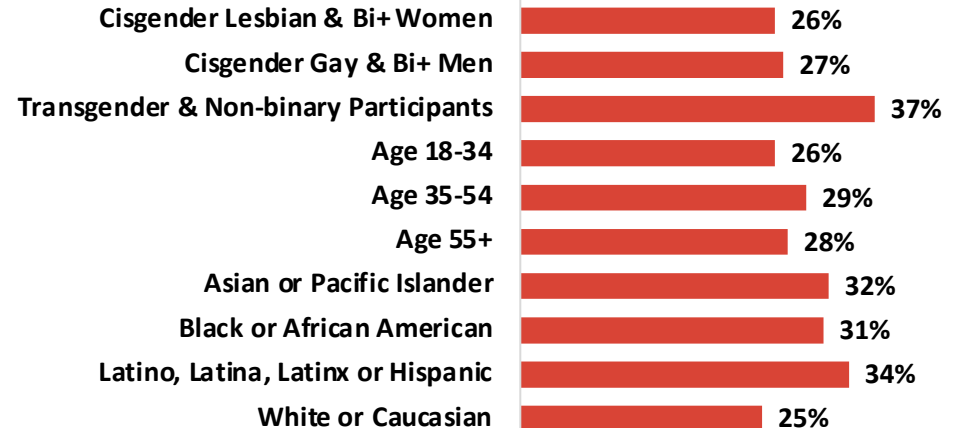
Forty-eight percent (48%) of all participants reported some concern about losing their healthcare. That concern is highest among transgender and non-binary community members. Black, Latinx and Asian LGBTQ participants had greater concerns than White participants.

Q: Do you worry about being able to maintain your health care coverage?

All LGBTQ



Major Concerns by Demographic

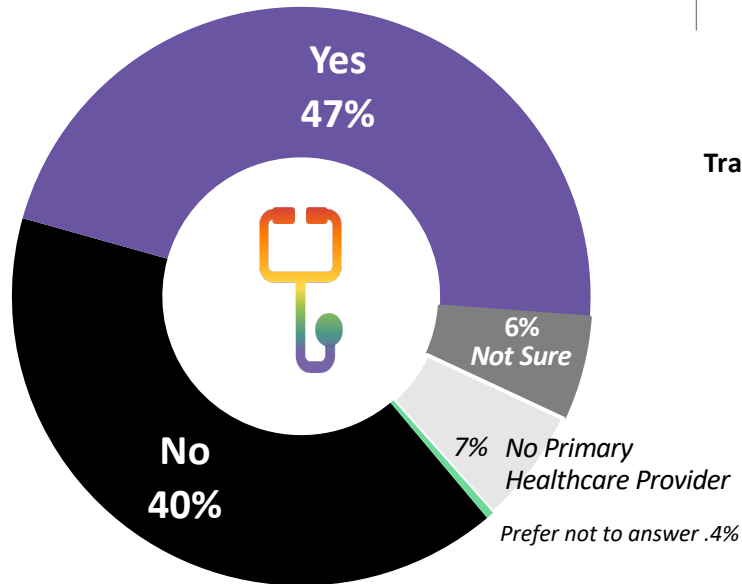


LGBTQ-Friendly Health Coverage

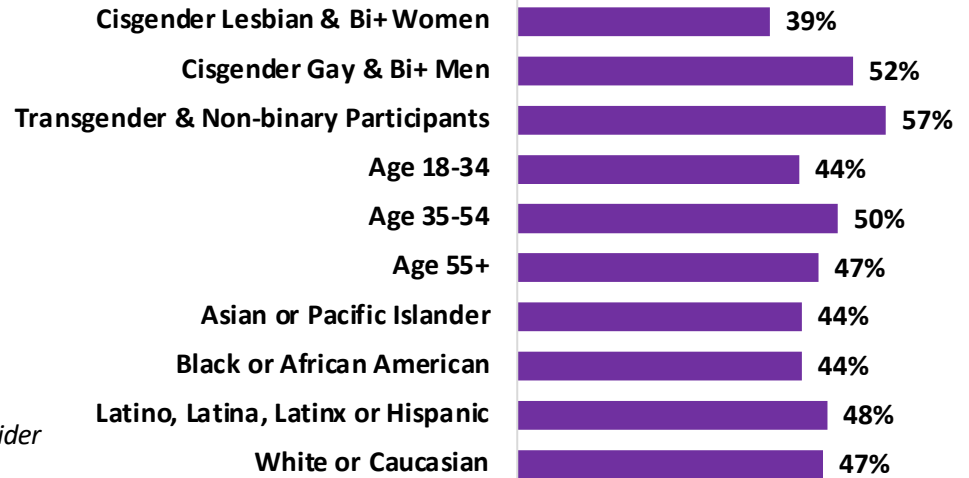
About half of participants (47%) reported searching for a doctor or plan known to be LGBTQ-friendly, and/or known to provide quality care to LGBTQ people. LGBTQ-friendly coverage and care was especially important among transgender and non-binary participants, and gay men.

Q: When deciding on your primary healthcare provider and health plan, did you seek out a doctor or plan known to be LGBTQ-friendly, or known to provide quality care to LGBTQ people?

All LGBTQ



LGBTQ-Friendly Coverage Sought by Demographic



Smoking and Vaping

Among study participants, 17% smoked tobacco or vaped (11% are daily or occasional tobacco users). The actual smoking rate is possibly higher in the LGBTQ community, but lower in this market research due to the high educational levels of the participants (see slide 50). General population research shows that education level is an important indicator of tobacco use. Today, the popularity of vaping complicates tobacco use history and prevention programs. The study shows a higher use of vaping vs. smoking tobacco among young LGBTQ participants.

All LGBTQ

What is your history with smoking tobacco? Please choose the best answer.											
		Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants	Age 18-34	Age 35-54	Age 55+	Asian or Pacific Islander	Black or African American	Latino, Latina, Latinx or Hispanic	White or Caucasian
I have never smoked tobacco	41%										
I have tried tobacco in the past, but never smoked regularly	23%										
I am a past tobacco smoker, but I quit	24%										
I occasionally smoke tobacco (not every day)	4%	3%	5%	5%	5%	5%	3%	4%	5%	5%	4%
I am a daily or regular tobacco smoker	7%	5%	8%	7%	4%	9%	7%	10%	8%	4%	7%
In the past 12 months, have you “vaped” or used an e-cigarette?											
Yes	11%	9%	12%	11%	17%	11%	5%	9%	11%	14%	10%
No	89%										

All LGBTQ

All LGBTQ n=15,042

See methodology for segment bases.



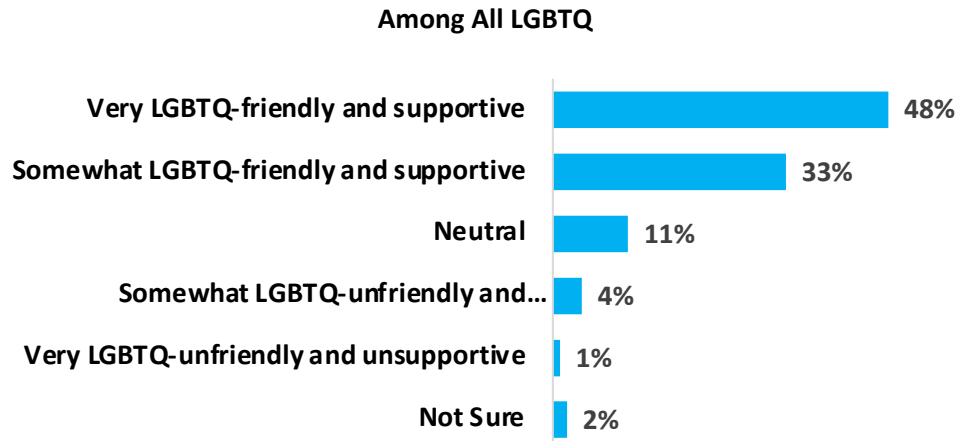
8

Finances and Employment

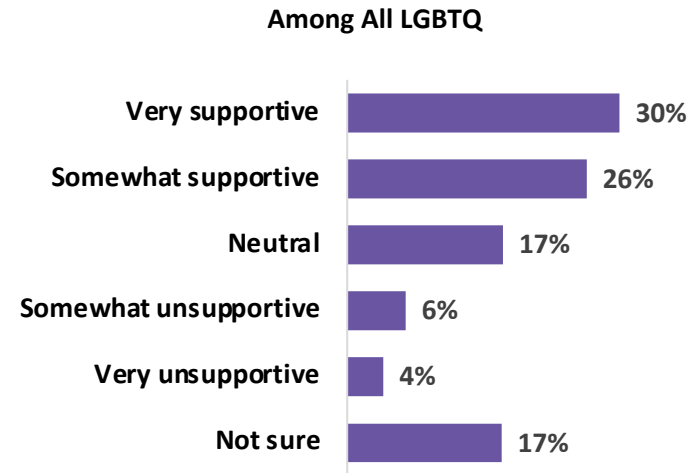
Support in the Workplace

In general, LGBTQ community members feel that their employer is LGBTQ-friendly (81% LGBTQ friendly and supportive). The high percentage may be a function of LGBTQ employees seeking work at LGBTQ-friendly companies. However, when asked if the company supports their transgender and non-binary employees, the percentage falls (56% supportive). Of note was that 17% of all LGBTQ participants were not sure if their employer was trans-supportive. When transgender and non-binary employees were asked about their employer, 62% indicated that they work for a supportive company, 24% indicated neutral or unsure, and 14% unsupportive.

Q: How LGBTQ-friendly and supportive do you consider your primary employer or company to be?



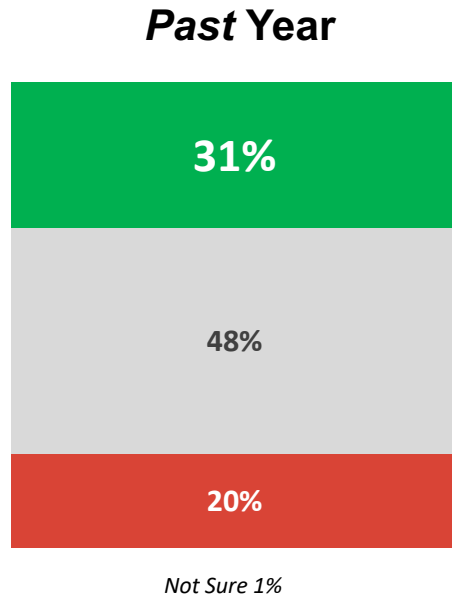
Q: How supportive of transgender and non-binary employees is your primary employer or company?



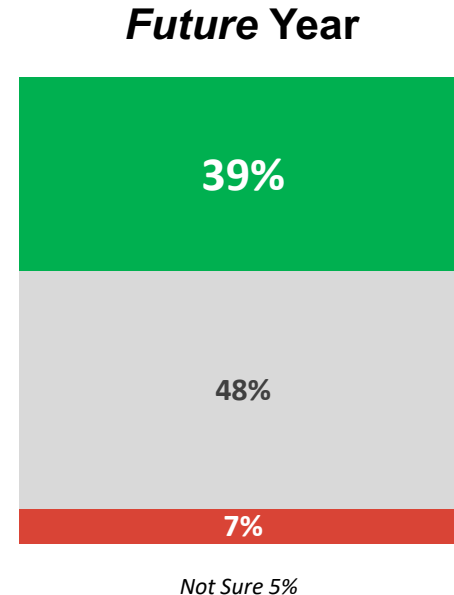
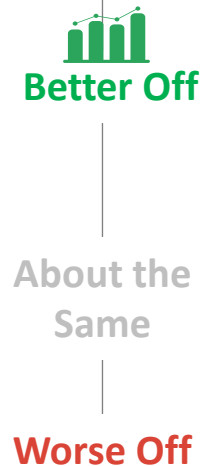
Financial Position Over Time

In general, the LGBTQ community is optimistic that the upcoming year will be better than the past year. Compared to last year's survey, the future year optimism increased 11%.

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



Q: 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?

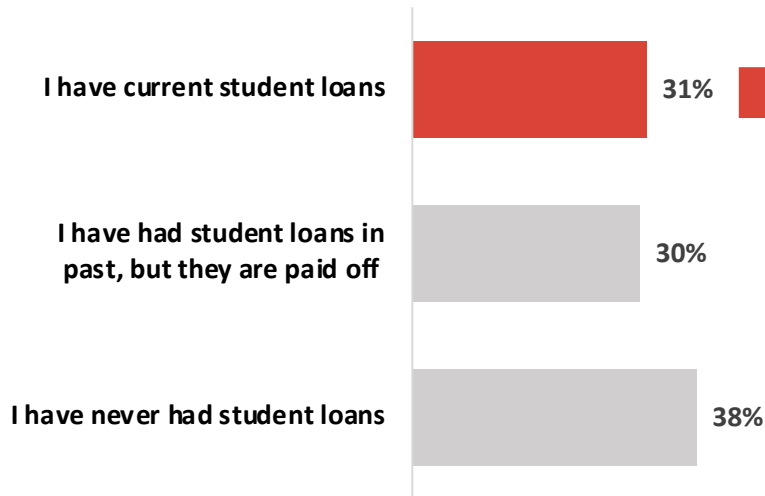


Base: All LGBTQ n=15,042

Student Loans

Participants in this research are well-educated, with 71% having a bachelor's degree or higher. Almost a third of LGBTQ participants currently have student loans, and among those, 45% are struggling to make their payments. For participants under age 35, 49% have current student loans (many in this age group are still students and loan payments are pending for their future).

Q: What is your personal history with taking out student loans?



Q: Currently, do you struggle to make your monthly student loan payment?



45% Yes

46% No

Not Sure 5%
Prefer not to answer 4%

Understanding the Complexity of LGBTQ Median Household Income (HHI)

Conclusion: It is important to recognize that focusing on LGBTQ median HHI rates alone may be misleading. The LGBTQ community is made up of individuals across the economic scale, and therefore marketers will find segments within the community for virtually every product and service. And most importantly, there are individuals and families in the LGBTQ community who need government, non-profit, and corporate support to reach employment and income equality.

LGBTQ people are more likely to live in big cities and blue states where median HHI is higher, but so are expenses.

The HHI of LGBTQ participants in this research is similar to the United States general population.

**Median HHI
of LGBTQ
Research
Participants:
\$72,200**

Seventy-one percent (71%) of the participants in the research have a bachelor's degree or higher. This HHI is not impressive given the education level of the sample and may indicate job/income discrimination.

However, about half of participants are in dual income households. Lower marriage rates reduce median HHI in the LGBTQ community compared to the general population.

Gender income inequality matters in the United States, which can drive income higher for male same-sex couples and lower income for female same-sex couples.

This and other studies have identified significant income and job discrimination against transgender community members.



9

**LGBTQ
Consumer
Purchasing**

Large Purchases and Electronics

Q: Do you (or you and your partner) plan to purchase any of the following during the next 12 months?
Please mark all that apply. I plan to purchase in the next 12 months...

	All LGBTQ	Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Age 18-34	Age 35-54	Age 55+
\$500+ of home furniture	27%	30%	25%	20%	31%	29%	21%
\$500+ of new clothing	27%	30%	23%	24%	29%	31%	20%
\$500+ of electronics for home or personal use	26%	33%	20%	24%	30%	28%	21%
Purchase or lease a new or used car	17%	19%	16%	17%	16%	19%	16%
A house, condo or other type of real estate	13%	14%	11%	12%	14%	15%	9%
\$500+ of kitchen appliances	12%	14%	11%	9%	9%	13%	13%
\$500+ of skin and beauty products	11%	12%	9%	12%	11%	13%	8%
\$500+ of home furniture	27%	30%	25%	20%	31%	29%	21%

Entertainment Purchases

Q: Will you (or you and your partner) pay for any of the following entertainment/information services during the next 12 months?
Please mark all that apply.

	All LGBTQ	Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Age 18-34	Age 35-54	Age 55+
Streaming television subscription <i>(e.g. Netflix, Amazon Prime, Hulu)</i>	81%	80%	82%	77%	85%	86%	71%
Cable internet	56%	60%	54%	49%	49%	56%	62%
Subscription radio or paid music <i>(e.g. SiriusXM, Pandora, Spotify, Apple Music)</i>	50%	50%	52%	45%	62%	53%	37%
Cable television <i>(basic or with premium channels)</i>	31%	34%	30%	21%	11%	30%	48%
Premium (paid) news service; digital news subscription	21%	21%	22%	16%	21%	23%	19%
Satellite TV <i>(e.g. DIRECTV, Dish, etc.)</i>	7%	8%	7%	6%	2%	7%	12%
Premium (paid) dating app services	6%	10%	2%	4%	6%	7%	5%

Alcohol Purchases Among Age 21+

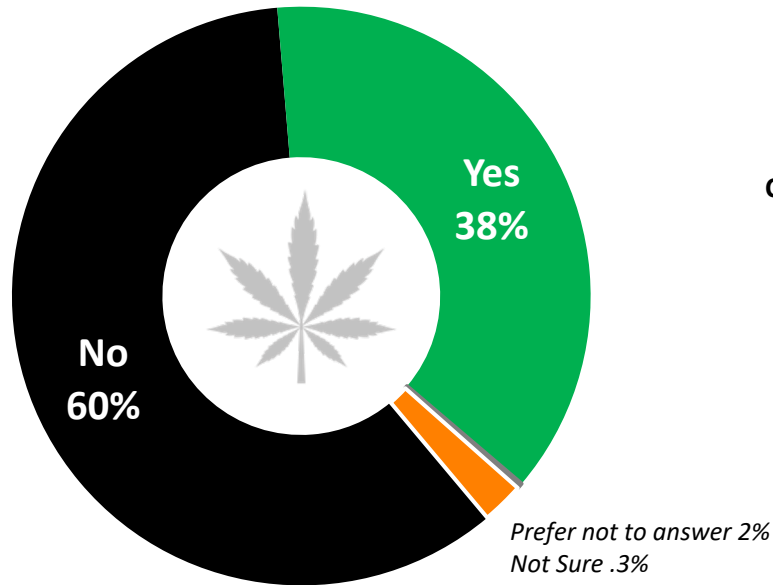
Q: In the past 30 days, what types of alcohol beverages have you purchased at a bar, restaurant or for home?
Please mark all that apply.

	All LGBTQ	Cisgender Gay & Bi+ Men	Cisgender Lesbian & Bi+ Women	Transgender & Non-Binary Participants	Age 21-34	Age 35-54	Age 55+
Wine (any type)	42%	46%	42%	30%	45%	42%	40%
Beer (any type)	37%	38%	38%	32%	43%	40%	30%
Vodka	26%	36%	19%	17%	30%	28%	21%
Bourbon or Whiskey	21%	25%	17%	18%	24%	24%	15%
Tequila	19%	23%	17%	12%	26%	19%	13%
Hard seltzer, hard lemonade or similar	18%	20%	18%	14%	32%	19%	7%
Rum	12%	14%	11%	10%	15%	14%	8%
Gin	12%	15%	10%	8%	16%	12%	8%
Other type of alcohol	8%	8%	8%	8%	10%	8%	6%
<i>I have not purchased alcohol beverages in the past 30 days</i>	30%	27%	31%	40%	25%	28%	37%

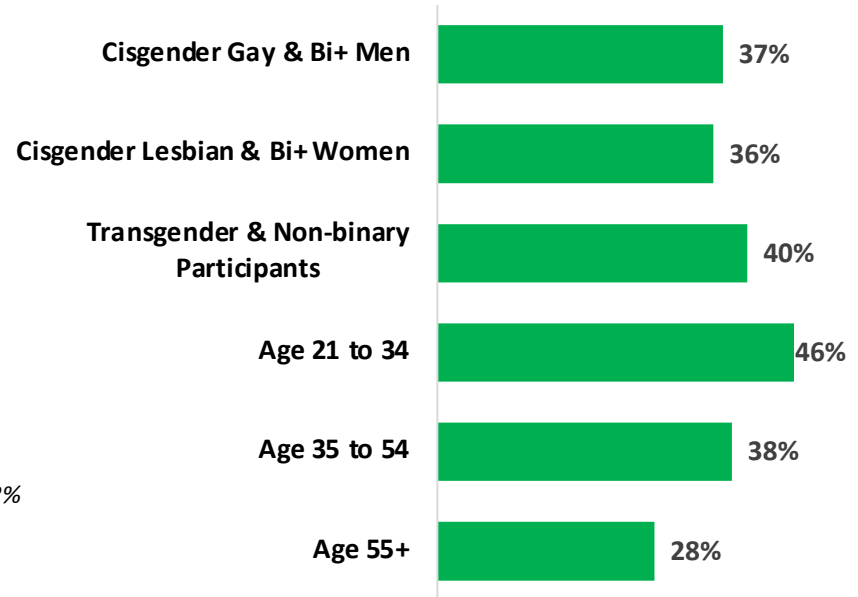
Cannabis and Marijuana Use

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

All LGBTQ Use



Use by Demographic





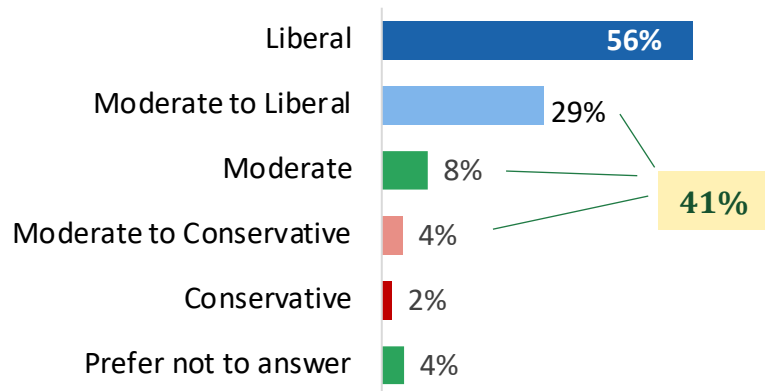
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Leaders in LGBTQ Research since 1992

Insights from 2019 and 2020 Reports

CMI does not ask every question, every year. The following slides are from our 2019 or 2020 reports. We present the data to supplement the 2021 report and we would not expect results to have significantly changed.

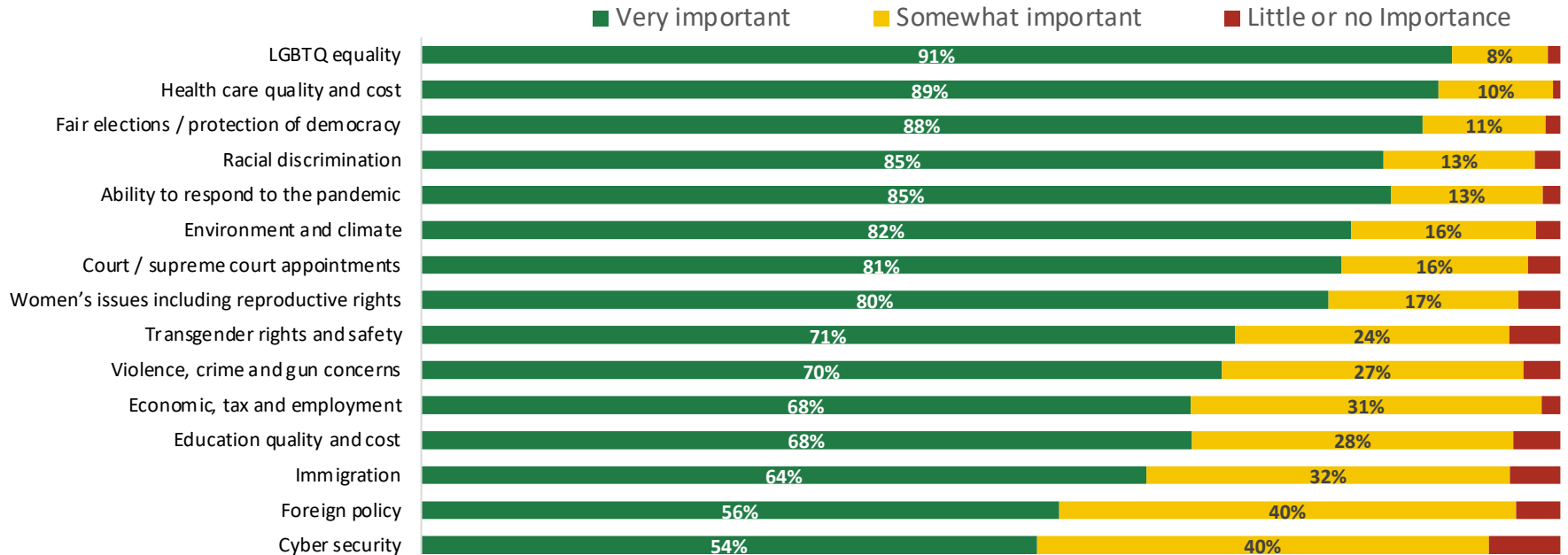
Political Views: Most of the LGBTQ participants trend liberal to moderate/liberal (85%). However, 41% indicated some moderate political views (50% of cisgender men, 33% of the cisgender women and 33% transgender/non-binary participants). By generation, Millennials+ (64%) and Baby Boomers+ (54%) were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

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



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.

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



Base: All LGBTQ n=17,230

Voting Motivations Full List:

Q: 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	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

Q: 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

Q: 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

Q: 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.)

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, because pets may take on a bigger role in LGBTQ households.

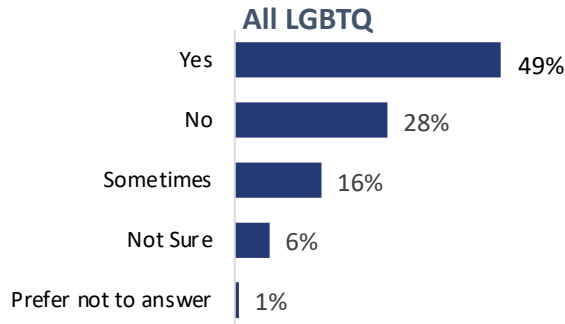
Q: Do you care for a pet or companion animal at home? Please mark all that apply.	ALL LGBTQ	Cisgender Lesbians & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants
Yes, I have a pet or companion animals at home	65%	75%	54%	68%
 One or more dogs	42%	47%	37%	37%
 One or more cats	34%	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%**

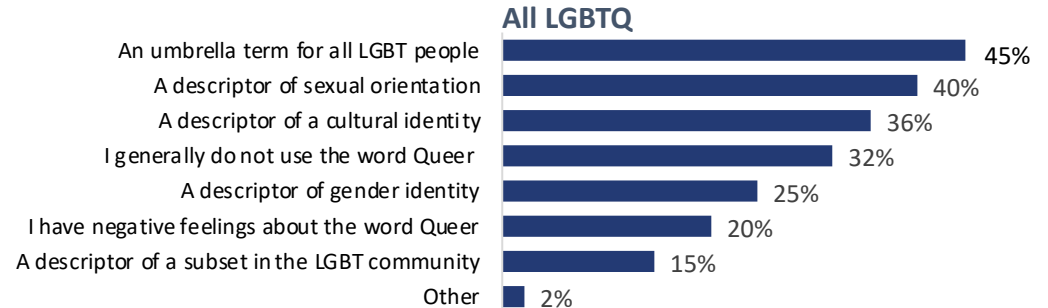


Complex Relationship with Queer: At CMI, we receive spirited comments from both sides about the term Queer: That we should *stop using* the word Queer because it is offensive, or that we should *exclusively use* the word Queer as the new umbrella term for the entire community. The data does not support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

Q: Do you personally identify as Queer?



Q: 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.)



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%

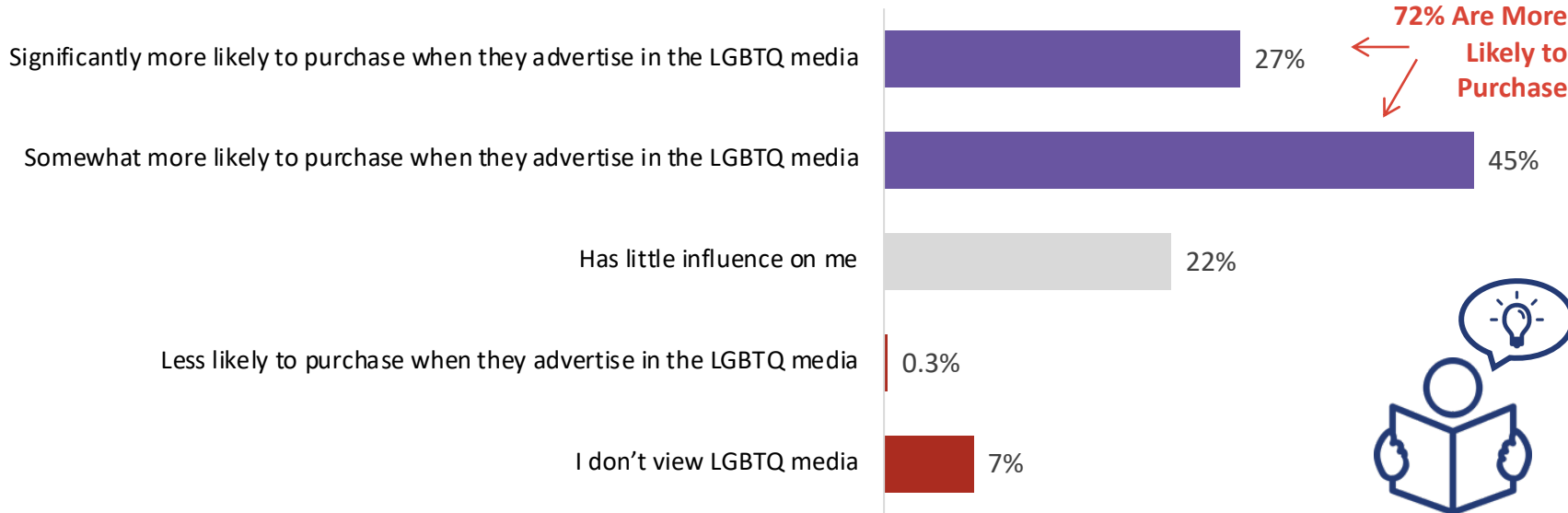
Indicated "An umbrella term for all LGBT people"	
Cisgender Lesbian & Bi+ Women	51%
Cisgender Gay & Bi+ Men	38%
Transgender & Non-Binary Participants	52%
Millennials+	61%
Generation X	42%
Baby Boomers+	32%

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

Importance of Advertising in the LGBTQ Media

Q: How are you influenced when companies advertise in the LGBTQ digital and print media?

Among All LGBTQ

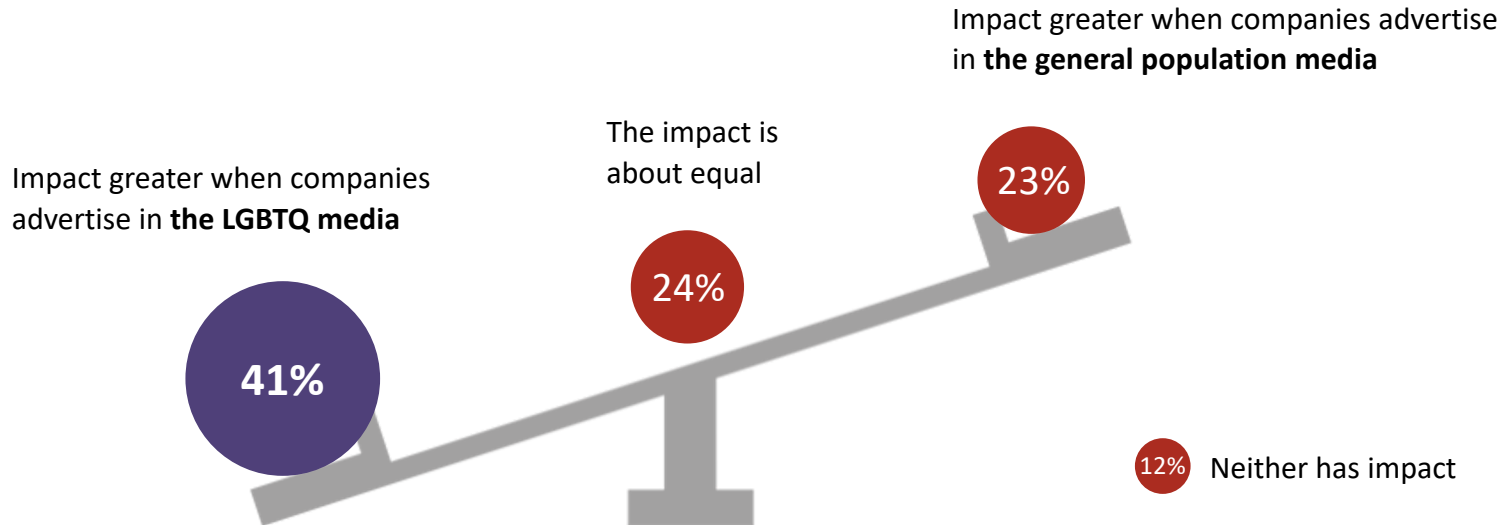


Base: All LGBTQ n=11,639

Impact of Advertising in the LGBTQ Media

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

Among All LGBTQ

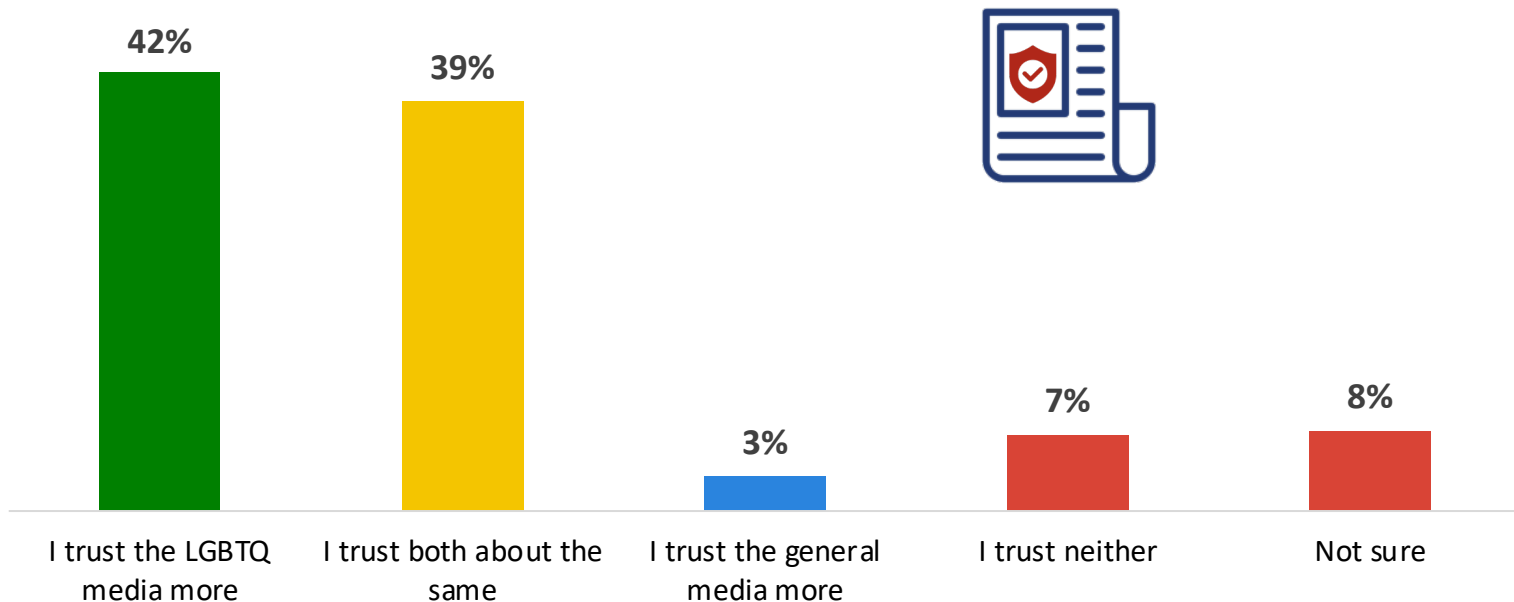


Base: All LGBTQ n=11,639

Trust in the LGBTQ Media

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

Among All LGBTQ



Base: All LGBTQ n=11,639

Beverage Purchases

**Q: 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)

Financial Products and Services

Q: 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.)

FOR MORE INFORMATION:

CMI's highly specialized services are based on 28+ 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:

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



Community Marketing & Insights

LGBTQ, Inc.

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www.CMI.info @LGBTQInsights

For more information, please contact

David Paisley, Senior Research Director

david@CMI.info

Member



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.



CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

LGBTQ Research Panel 2021

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with over 28 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)

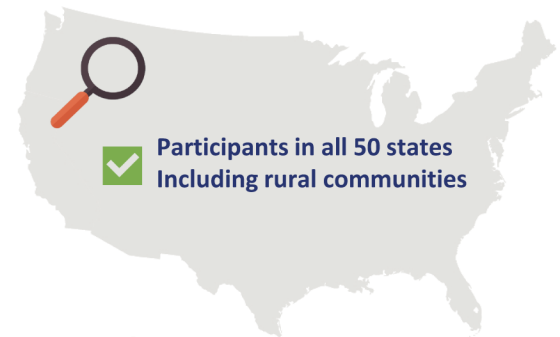


IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBTQ SEGMENT

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

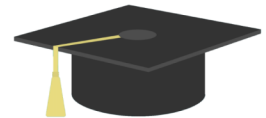
35%
Representing
LGBTQ
Communities
of Color



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: **03/31/22**
Renewal required by date above



The National LGBT Chamber of Commerce

Hereby Recognizes:

LGBTQ, Inc

As a Certified LGBT Business Enterprise™

(LGBTBE)



Justin G. Nelson
Co-Founder & President



Chance E. Mitchell
Co-Founder & CEO

