



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

# 16<sup>th</sup> Annual LGBTQ Community Survey<sup>®</sup>

USA Report | June 2022

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## About CMI: 30 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 diverse, community-representative LGBTQ research participants. Our work is worldwide, with an emphasis on the United States and Canada. 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 over three decades: 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, GLAAD, Google, Hallmark, Hawai'i Tourism Authority, Human Rights Campaign Foundation, Intercontinental Hotel Group, Johnson & Johnson, Kaiser Family Foundation, Las Vegas Convention & Visitors Authority, Marriott, New York Life, NYC & Company, New York State, Planned Parenthood, Realtor.com, San Francisco Convention & Visitors Bureau, T. Rowe Price, Target Brands, TD Bank, The Trevor Project, U.S. Census Bureau, U.S. Food and Drug Administration, U.S. Housing & Urban Development, UPS, Visit Britain, Visit California, Visit Lauderdale, Visit Salt Lake, Wells Fargo, Wilson Media Group, WNBA, and numerous other corporations and organizations across North America and around the world.

# CMI's 16<sup>th</sup> ANNUAL LGBTQ COMMUNITY SURVEY RESEARCH PARTNERS

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

Thank You  
to our partners

In Partnership With



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

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

Out Professionals  
OutClique Magazine  
OutSmart Magazine (Houston)  
Outward Sacramento  
PASSPORT Magazine  
Peach Magazine  
Persad Center (Pittsburgh)  
Philadelphia Gay News  
Pink Media  
POZ  
Pride Guide® USA  
Pridesource.com  
Q Voice News  
QLife  
Qnotes / QnotesCarolinas.com  
QSaltLake Magazine  
Queerty  
QVegas  
Rainbow Chamber of Silicon Valley  
Rainbow GUIDE Arc-en-ciel  
Real Health  
Sacramento Rainbow Chamber of Commerce  
San Francisco Bay Times  
Seattle Gay News (SGN)  
South Florida Gay News  
Squirt.org  
Tagg Magazine  
TransPonder  
Tu Salud  
Two Bad Tourists  
United Seattle  
Utah LGBTQ+ Chamber of Commerce  
Washington Blade  
Watermark (Florida)  
We Were There Inc  
Windy City Times  
Wisconsin LGBT Chamber of Commerce  
Xtra: LGBTQ25+ Culture, Politics and Health

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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 survey questionnaire, we do not profess that the results are representative of the "entire LGBTQ community." Instead, readers of this report should view results as a snapshot of LGBTQ community members who interact with 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. 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 14,843 self-identified LGBTQ community members living in the United States. This includes 10,045 cisgender gay and bi+ men, 2,916 cisgender lesbian and bi+ women, and 1,882 transgender and non-binary community members. While these numbers are "out of balance" by gender identity, we compensate through weighting to make the results balanced and reflective of the community. Also while the numbers for cisgender women and TGNB community members may be smaller than cisgender men, the numbers for all gender categories are greater than most other research. Overall, 21,000 respondents across the globe participated in the 2022 survey, which was fielded in English, Spanish and French. The survey was open to participants for a 60-day period during April and May 2022.

LGBTQ media-based outreach tends to attract participants who are 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 identity, cisgender women were weighted at 44%, cisgender men at 44%, and transgender/non-binary (TGNB) participants at 12%. By ethnicity, results were weighted 62% White or Caucasian, 15% Latino, Latina, Latinx or Hispanic, 13% Black or African American, 7% Asian or Pacific Islander, and 3% all other race and ethnicity categories.

## ABOUT CMI's 16<sup>th</sup> ANNUAL LGBTQ COMMUNITY SURVEY • METHODOLOGY & ASSUMPTIONS

### USA Report

Completes n=14,843 participants

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

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

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

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

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

Fielded April 1, 2022 to May 31, 2022

### Results Weighted by Gender Identity

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

### Results Weighted by Age Group

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

### Results Weighted by Race/Ethnicity

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

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## Impact of Outreach to the LGBTQ Community






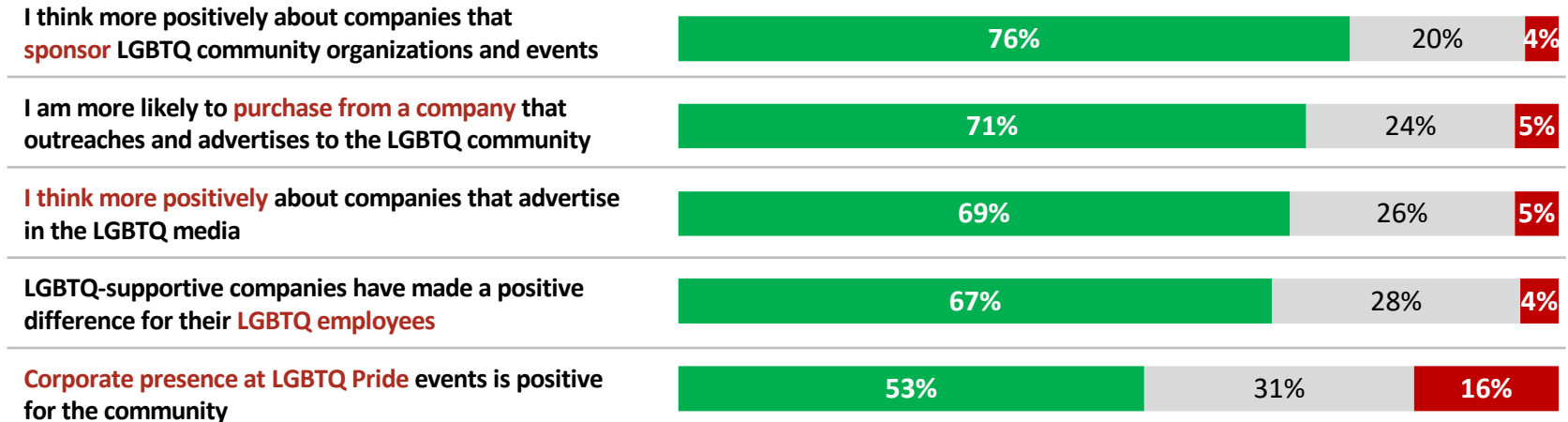


## Corporate Involvement in the LGBTQ Community

This question attempts to understand the impact of different outreach approaches when corporations partner with the LGBTQ community. The combination of sponsoring LGBTQ organizations and then letting the community know about the support through advertising remains a meaningful way to develop a positive brand reputation. We continue to see some reduction in favorable views about corporate involvement in Pride. This sentiment is fueled by younger LGBTQ people, with only 27% of age 18 to 34 agreeing with the Pride statement compared to 74% of age 55 or over. Specifically, for age 18 to 34, 27% agreed with the statement that corporate presence at LGBTQ Pride events is positive for the community; 40% were neutral and 33% disagreed.

**Q: Do you agree or disagree with the following statements about corporate involvement in the LGBTQ community?**

 Agree
  Neutral
  Disagree






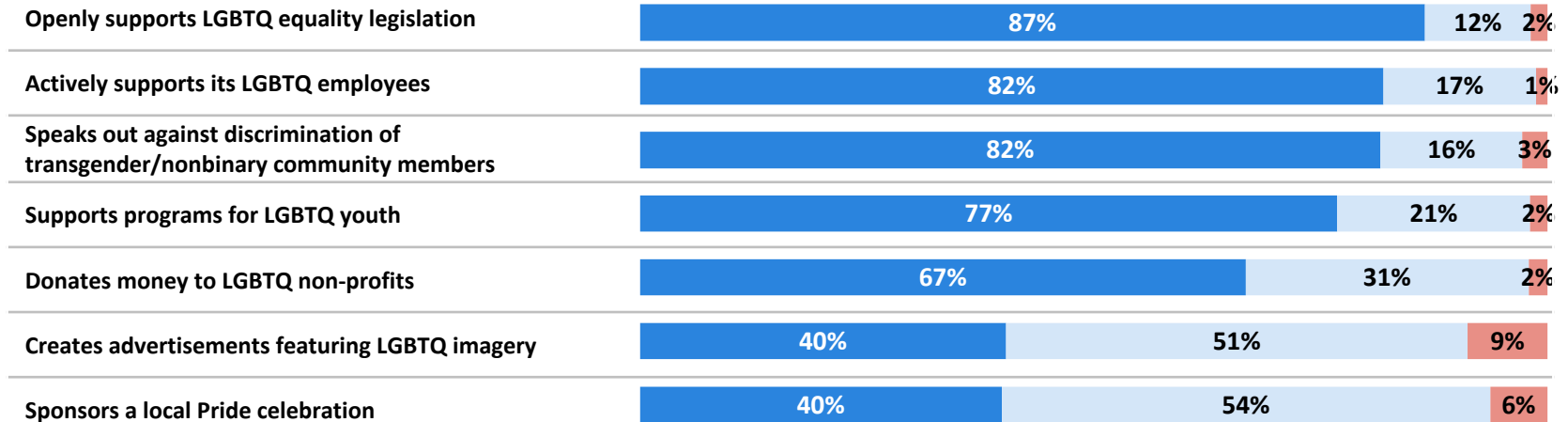


## Perceptions of Supportive Activities

While advertising and supporting LGBTQ non-profits and events are critical to improving brand reputation, corporations need to politically defend LGBTQ equality and financially support community non-profits in order to be considered an authentic ally to the community.

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

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

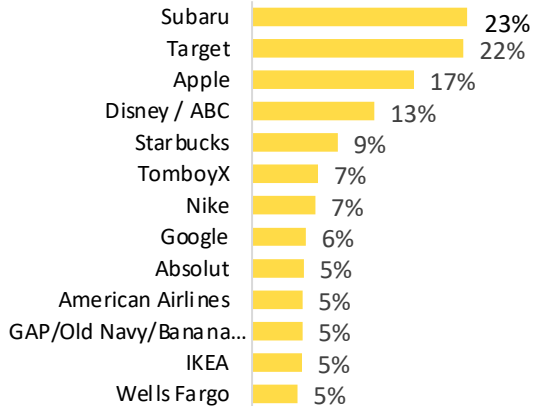


## Brand Recall

As an ongoing tracking question, 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. This is not multiple choice. Respondents fill in blank fields from recall.

**Q: 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.**

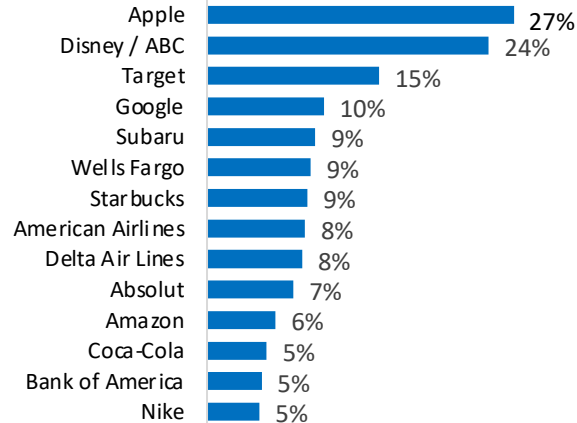
### Cisgender Lesbian & Bi+ Women



3%-4%

Ben & Jerry's, Coca-Cola, Bank of America, Levi's, Microsoft, Amazon, Adidas, Wildfang, Delta Air Lines, REI

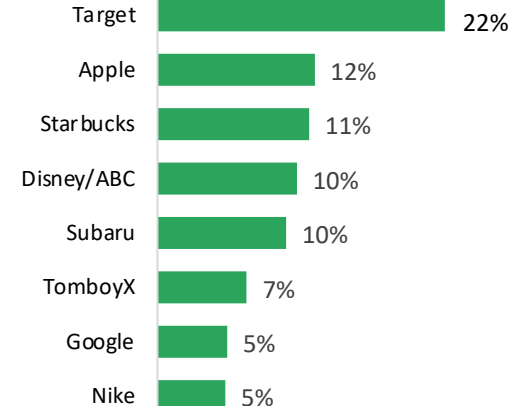
### Cisgender Gay & Bi+ Men



3%-4%

Levi's, Microsoft, IKEA, Chase/JP Morgan, GAP/Old Navy/Banana Republic, Macy's, Budweiser, United Airlines, Alaska Airlines, Ben & Jerry's

### Transgender and Non-Binary Participants







3%-4%

IKEA, Microsoft, gc2b, Levi's, Amazon, Adidas, Ben & Jerry's, Coca-Cola, REI, GAP/Old Navy/Banana Republic, Converse

## Frequency of Interaction with LGBTQ Media

LGBTQ community members continue to consume LGBTQ media at about the same rates as the year before, with older generations having more stable interaction and younger community members *increasing* their interaction.

**Q: Has your interaction with LGBTQ media (newspapers, websites, email newsletters, social media, etc.) changed over the past 12 months?**

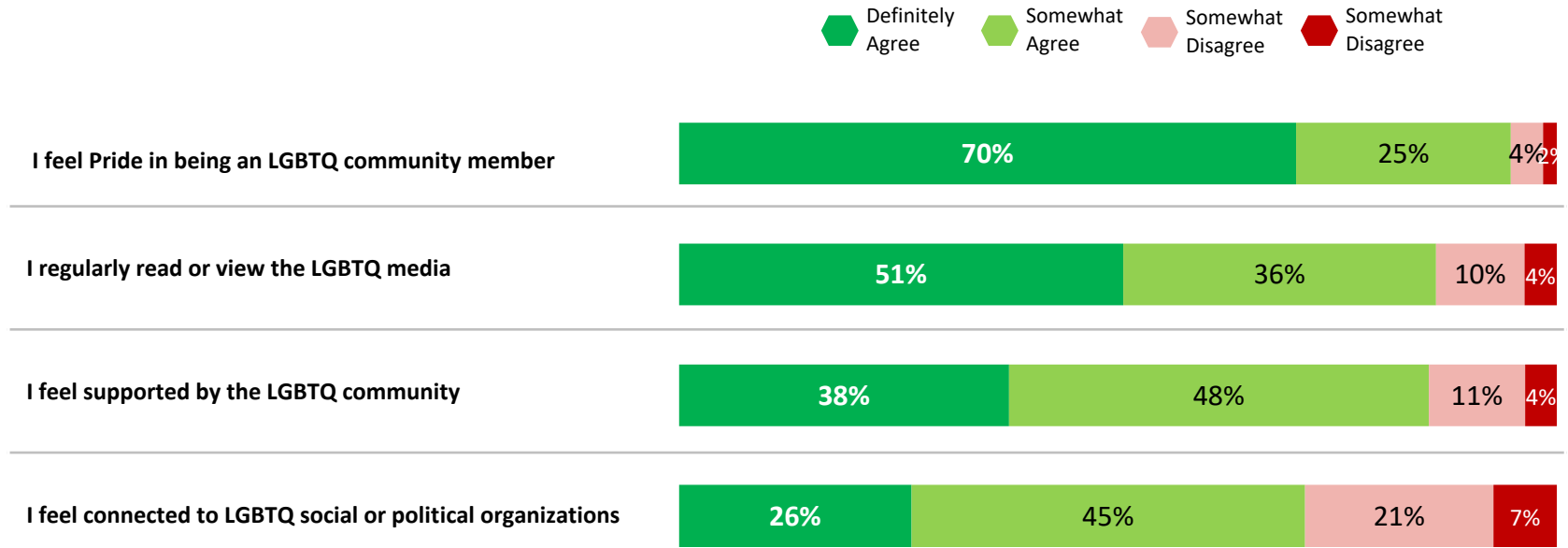
	All LGBTQ	Age 18-34	Age 35-54	Age 55+
Increased	 15%	19%	14%	13%
Stayed the Same	 67%	64%	66%	70%
Decreased	 11%	9%	12%	11%
Not sure	 7%	8%	7%	6%



## 2021 Results: Engagement within the LGBTQ Community

As additional information from CMI's 15<sup>th</sup> Annual survey, participants generally feel connected to and engaged with the overall LGBTQ community.

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



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**LGBTQ  
Demographics and  
Discrimination**



## Relationship Status

In reviewing CMI's LGBTQ Community Survey data over recent years, LGBTQ marriage rates appear stable. Relationship status and the percentage married in the LGBTQ community have not significantly changed over the past two years. 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 corroborated in CMI's previous studies, 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 housing, health 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 & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender and Non-Binary Participants
Single / not in a relationship	28%	39%	34%
In a relationship but not living with a partner	9%	9%	9%
In a relationship and living with a partner (with no legal status)	13%	14%	13%
Legally married	36%	27%	27%
Civil union, registered domestic partner or common law	2%	2%	1%
Engaged to a partner	3%	2%	2%
Partner deceased and currently single	2%	2%	2%
Divorced and currently single	3%	1%	4%
Polyamorous relationship	2%	1%	6%
Something else	1%	1%	2%
Decline to answer	1%	1%	<1%

## 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 and instead, should use inclusive terminology and policies.

**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 Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender and Non-Binary Participants
Female same-sex couple (female-female couple)	81%	--	22%
Male same-sex couple (male-male couple)	--	91%	16%
Opposite-sex couple (female-male couple)	13%	8%	15%
Non-binary / Transgender couple (where one or both partners identifies as transgender or outside the gender binary)	8%	1%	56%
Queer couple (any gender)	16%	2%	34%
Polyamorous relationship	2%	2%	9%
Something else	1%	<1%	2%



## LGBTQ Parents

There are more LGBTQ parents than many might think. In this study, 23% of LGBTQ participants have a child of any age (the same percentage as last year). 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.

**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
<b>Parents (of children of any age)</b>	<b>23%</b>	<b>28%</b>	<b>15%</b>	<b>31%</b>
Yes, I have children under age 18 living in my home	7%	11%	4%	9%
Yes, I have children under age 18 not living in my home	2%	2%	1%	2%
Yes, I have children age 18 or over	12%	15%	9%	18%
<i>Prefer not to answer</i>	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.



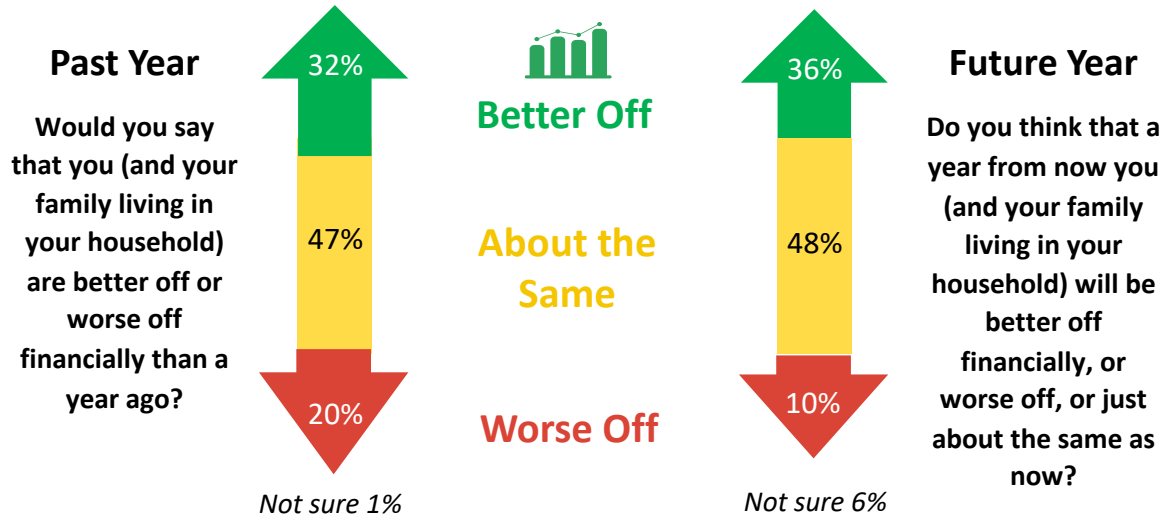
# 19%

of LGBTQ Baby Boomers+  
Have Grandchildren

## Financial Confidence

The survey asks participants multi-year tracking questions about their financial and economic confidence. LGBTQ consumers--especially younger LGBTQ community members--indicated that they are more positive to neutral about their economic situation. The results were stable from the year before. The survey was fielded in April/May 2022. This is important because the time of fielding can significantly influence results for this question.

### 2022 Results

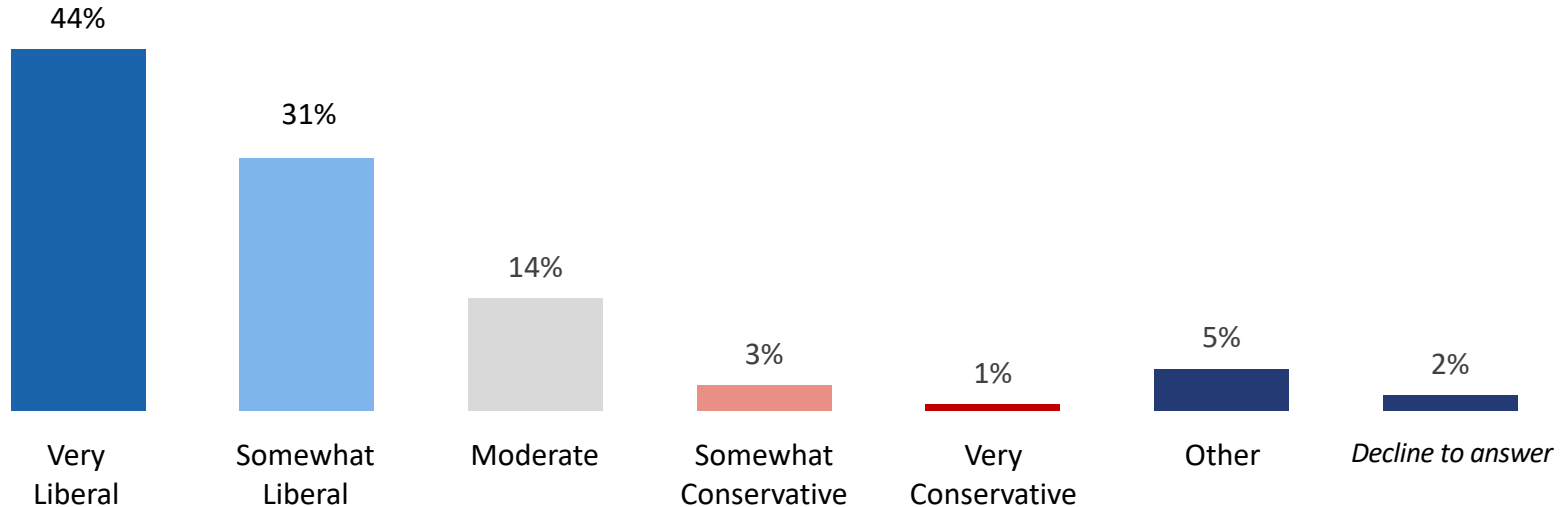


	Better Off Past Year	Better Off Next Year
All LGBTQ	32%	36%
Cisgender Gay & Bi+ Men	32%	36%
Cisgender Lesbian & Bi+ Women	33%	37%
Transgender & Non-Binary Participants	28%	33%
Age 18-34	40%	46%
Age 35-54	36%	40%
Age 55+	20%	22%
Asian / Pacific Islander	29%	34%
Black / African American	35%	48%
Latinx	34%	43%
White (Non-Hispanic)	31%	32%

## Political Tendency

Most of the LGBTQ participants trend liberal, with few considering themselves conservative. Only 44% consider themselves very liberal, which may mean that the majority of the community has at least some moderate political viewpoints.

Q: Politically, do you consider yourself to be..?



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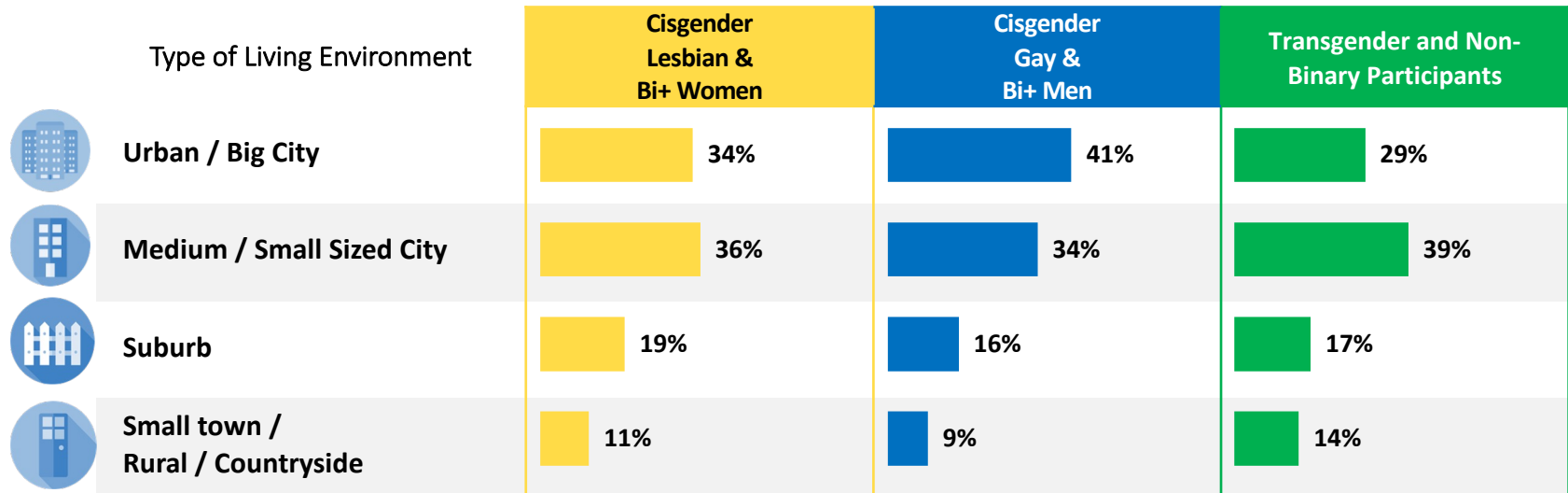
## Living in LGBTQ-friendly Communities



## Type of Living Environment

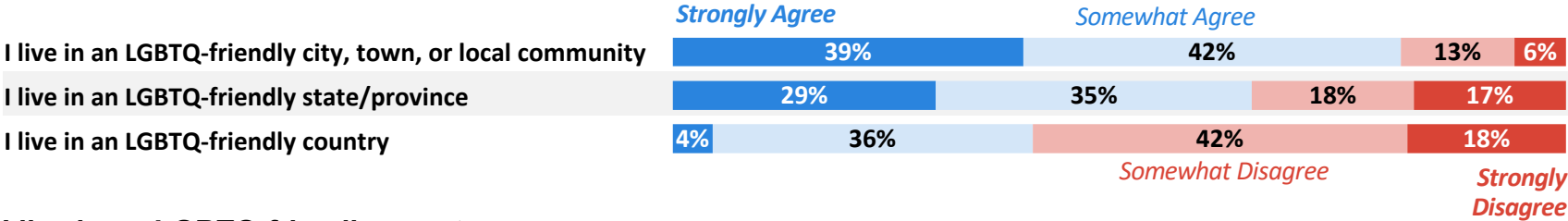
LGBTQ survey participants live in a wide variety of community types. While cisgender gay and bi+ men have a higher likelihood of living in big cities, only 41% live in big city environments. Cisgender lesbian and bi+ women, transgender, and non-binary participants were more dispersed, living in many 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 one or two percentage points 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

To track trends, CMI has been asking this question for several years. The percentage of United States residents thinking the county is LGBTQ-friendly has plummeted from 56% in 2021 to 40% in 2022. When residents are asked to evaluate their own states, California, New York and Illinois residents continue to feel that their state is LGBTQ-friendly. The sentiment of Florida residents as living in an LGBTQ-friendly state drastically dropped this past year. Texas dropped even further than last year.



## I live in an LGBTQ-friendly country

40% of **USA residents** agree that the United States is an LGBTQ-friendly country  
 94% of **Canadian residents** agree that Canada is an LGBTQ-friendly country

## I live in an LGBTQ-friendly state

Agreed by  
 residents of each  
 state

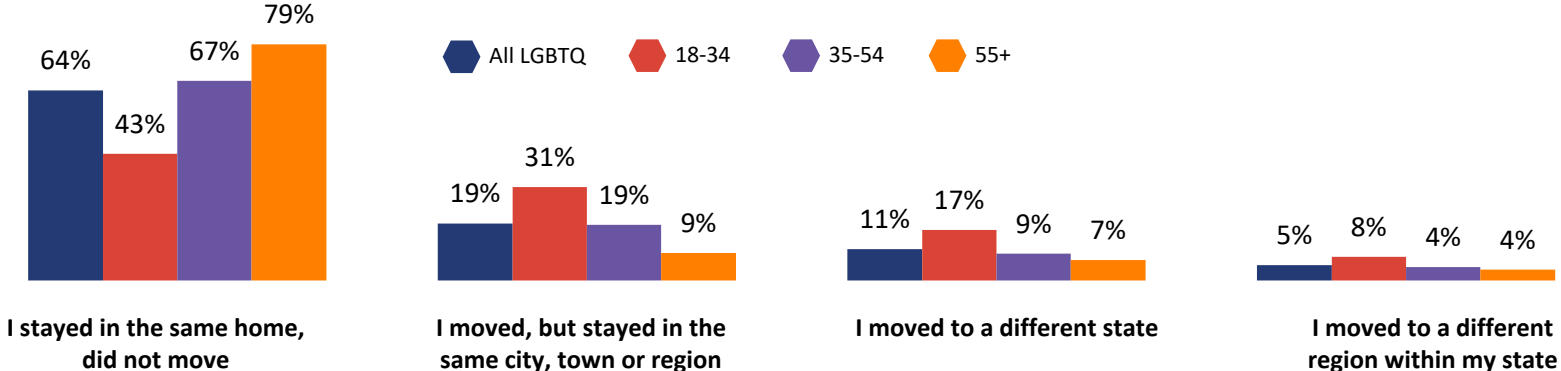
- California:** 98% of residents agreed (Down 1% compared to 2021)
- New York:** 96% of residents agreed (Down 1% compared to 2021)
- Illinois:** 91% of residents agreed (Down 1% compared to 2021)
- Georgia:** 26% of residents agreed (Down 7% compared to 2021)
- Florida:** 24% of residents agreed (Down 19% compared to 2021)
- Texas:** 16% of residents agreed (Down 6% compared to 2021)

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

# LGBTQ Migration

Comparing now to two years ago, 36% of the LGBTQ community indicated having moved. Younger participants age 18 to 34 were the most likely to change homes, with 57% indicating a move. While most stayed in the same region as they lived previously, we did see 11% of all LGBTQ participants change states. Trends seem similar as reports in the general population: The New York region and the Midwest lost LGBTQ population. California lost population, while Arizona and Nevada gained population. Florida gained LGBTQ population. We did not see any change in LGBTQ population for Texas.

**Q: We want to look at LGBTQ migration in the past two years.**  
**Comparing where you lived two years ago to today, what best describes your living region?**



Fewer than 1% of participants indicated moving abroad.







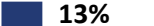
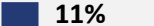
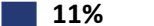


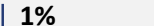

All LGBTQ n=14,843  
 See methodology for segment bases.



## Reasons for Moving

Q: Why did you move? Please mark all that apply.

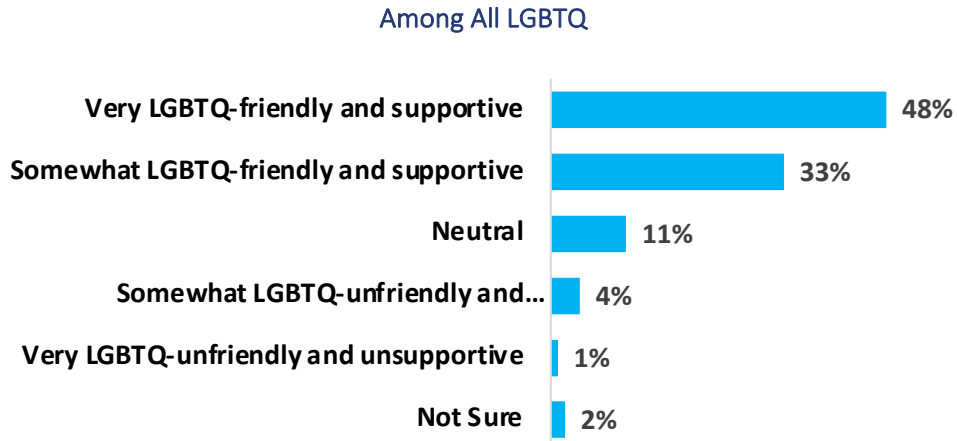
Among Those Who Moved in the Past 2 Years

	All LGBTQ	Age 18-34	Age 35-54	Age 55+
I moved for a job or employment reasons	 45%	58%	45%	18%
I wanted to improve the quality of my life in general	 45%	44%	48%	42%
I moved for other family or relationship reasons	 32%	34%	32%	26%
I wanted to live in a place with a lower cost of living	 23%	24%	25%	20%
I wanted to live in a more liberal region	 20%	22%	21%	14%
My work allows me to work from anywhere	 17%	16%	23%	12%
I wanted to live in a place where I could purchase a home	 13%	11%	14%	15%
I wanted to live in a larger population area	 11%	17%	8%	4%
I need to be closer to an aging or ill family member or friend	 11%	7%	15%	14%
I wanted to live in a smaller population community	 10%	7%	10%	15%
I wanted to live in a place with lower rents	 9%	9%	9%	8%
I wanted to live in a more conservative region	 1%	0%	1%	1%
Other	 23%	23%	17%	30%

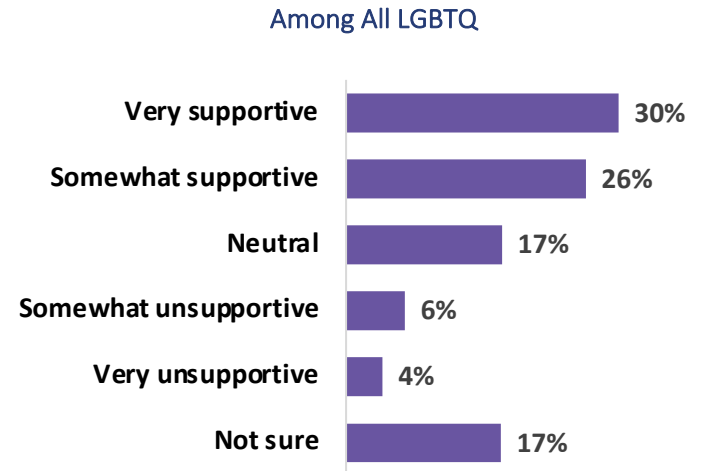
## 2021 Results: Support in the Workplace

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 is 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% said that their employer is trans-unfriendly.

**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?**



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## Terminology within the LGBTQ Community

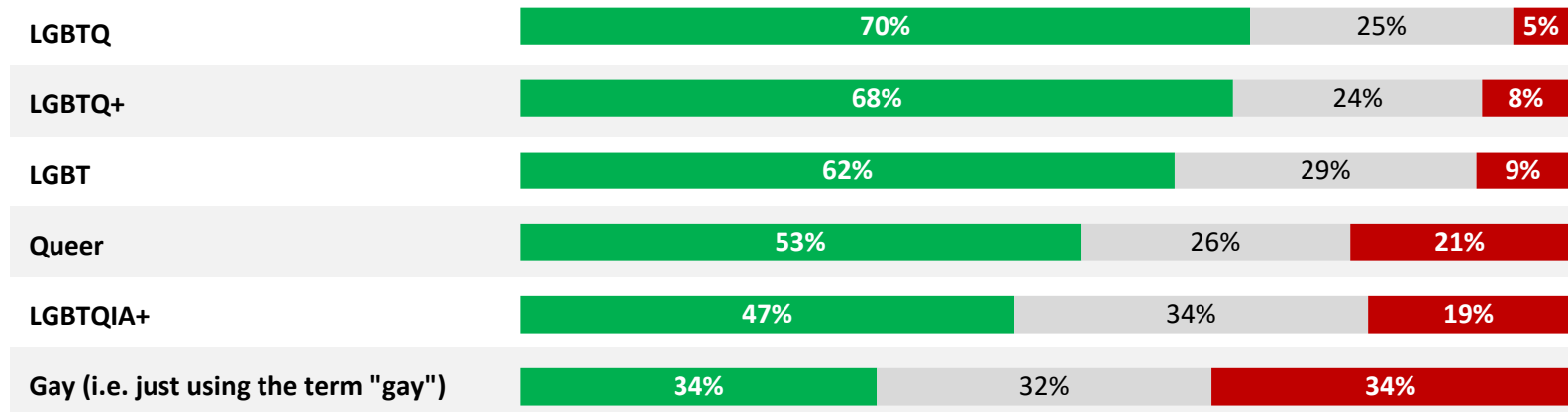


## Terminology Within the LGBTQ Community

Last year in our annual poll about community terminology, “LGBTQ” was the preferred term to describe our community. However, we began to see the rise of LGBTQ+. This year LGBTQ and LGBTQ+ are virtually tied as preferred terms, with the momentum continuing to shift to LGBTQ+. Compared to last year, LGBTQ has the same favorable rating and LGBTQ+ increased in favorability from 65% to 68%. CMI feels that based on trends over the past few years, LGBTQ or LGBTQ+ may be used today to appropriately describe the community. There is still resistance to increasing the alphabet to LGBTQIA+ in the United States (although this and other terms are 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...**



## 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 Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants	Age 18 to 34	Age 35 to 54	Age 55+
<b>LGBT</b>	<i>Favorable</i>	58%	70%	50%	52%	60%	74%
	<i>Neutral</i>	32%	24%	37%	37%	30%	21%
	<i>Unfavorable</i>	10%	6%	12%	11%	10%	6%
<b>LGBTQ</b>	<i>Favorable</i>	74%	66%	66%	68%	68%	72%
	<i>Neutral</i>	22%	27%	29%	28%	26%	22%
	<i>Unfavorable</i>	4%	7%	5%	4%	6%	6%
<b>LGBTQ+</b>	<i>Favorable</i>	75%	60%	71%	75%	69%	61%
	<i>Neutral</i>	20%	27%	25%	20%	23%	28%
	<i>Unfavorable</i>	5%	13%	4%	5%	9%	11%
<b>Queer</b>	<i>Favorable</i>	62%	41%	67%	66%	54%	42%
	<i>Neutral</i>	23%	30%	21%	21%	25%	30%
	<i>Unfavorable</i>	15%	30%	12%	13%	21%	28%

All LGBTQ n=14,843

See methodology for segment bases.

# 16<sup>th</sup> Annual LGBTQ Community Survey<sup>®</sup>

USA Report | June 2022

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**LGBTQ Consumer  
Purchasing**



## 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 Lesbian & Bi+ Women	Cisgender Lesbian & Bi+ Men	Transgender & Non-Binary Participants	Age 18-34	Age 35-54	Age 55+
<b>Streaming television subscription</b> <i>(e.g. Netflix, Amazon Prime, Hulu)</i>	82%	84%	80%	78%	85%	87%	73%
<b>Subscription radio or paid music</b> <i>(e.g. SiriusXM, Pandora, Spotify, Apple Music)</i>	53%	55%	52%	50%	65%	56%	40%
<b>Cable internet</b>	53%	50%	57%	45%	44%	54%	59%
<b>Cable television</b> <i>(basic or with premium channels)</i>	31%	30%	34%	21%	12%	29%	48%
<b>Premium (paid) news service; digital news subscription</b>	23%	25%	22%	19%	24%	25%	20%
<b>Premium (paid) dating app services</b>	7%	3%	12%	6%	8%	9%	5%
<b>Satellite TV</b> <i>(e.g. DIRECTV, Dish, etc.)</i>	7%	6%	7%	7%	2%	5%	12%



## 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 Lesbian & Bi+ Women	Cisgender Lesbian & Bi+ Men	Transgender & Non-Binary Participants	Age 18-34	Age 35-54	Age 55+
<b>\$500+ of new clothing</b>	31%	28%	33%	29%	34%	35%	23%
<b>\$500+ of home furniture</b>	29%	28%	30%	25%	32%	32%	22%
<b>\$500+ of electronics for home or personal use</b>	27%	23%	31%	27%	30%	29%	23%
<b>Purchase or lease a new or used car</b>	16%	15%	17%	16%	12%	18%	17%
<b>\$500+ of kitchen appliances</b>	14%	14%	15%	13%	12%	15%	15%
<b>\$500+ of skin and beauty products</b>	13%	13%	13%	13%	14%	17%	8%
<b>A house, condo or other type of real estate</b>	12%	11%	13%	10%	13%	14%	9%

All LGBTQ n=14,843

See methodology for segment bases.

## Alcohol Purchases

**Q: In the past 90 days, have you consumed any type of beverage containing alcohol?**

Among Age 21+  
Percentages Indicating “Yes”



## Alcohol Purchases Among Age 21+ Alcohol Consumers

Q: In the past 90 days, what types of alcohol beverages have you purchased or consumed at a bar, restaurant or for home?  
Please mark all that apply.

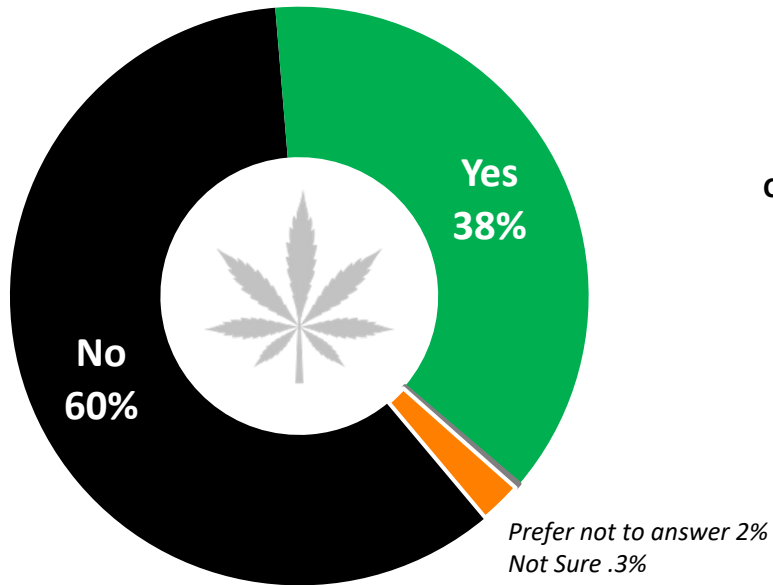
	All LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Gay Bi+ Men	Transgender & Non-Binary Participants	Age 21-34	Age 35-54	Age 55+
Wine (any type)	69%	70%	70%	59%	71%	66%	69%
Beer (any type)	58%	57%	58%	56%	63%	59%	51%
Vodka	42%	35%	52%	32%	47%	44%	36%
Bourbon or Whiskey	36%	32%	40%	35%	41%	40%	27%
Tequila	32%	30%	36%	25%	44%	33%	21%
Hard seltzer	24%	22%	26%	19%	41%	22%	8%
Gin	22%	20%	26%	19%	32%	22%	14%
Rum	22%	18%	26%	19%	30%	21%	14%
Canned cocktail	12%	12%	12%	9%	21%	11%	4%
Other alcohol drinks	16%	16%	15%	22%	21%	16%	11%
<i>Base (Have purchased alcohol in past 90 days)</i>	10,815	4,730	4,927	1,158	3,452	3,874	3,489

All LGBTQ n=10,815  
See methodology for segment bases.

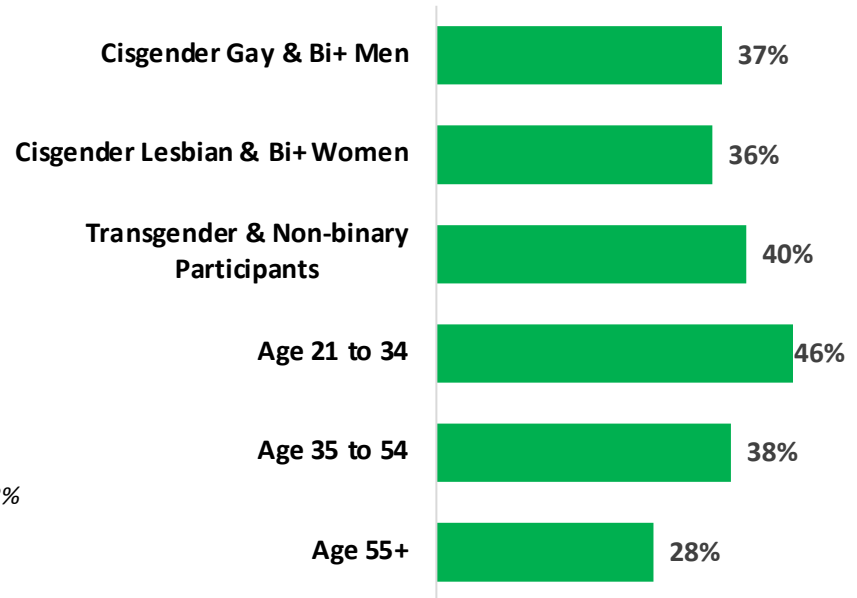
## 2021 Results: Cannabis and Marijuana Use

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



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

# 16<sup>th</sup> Annual LGBTQ Community Survey<sup>®</sup>

USA Report | June 2022

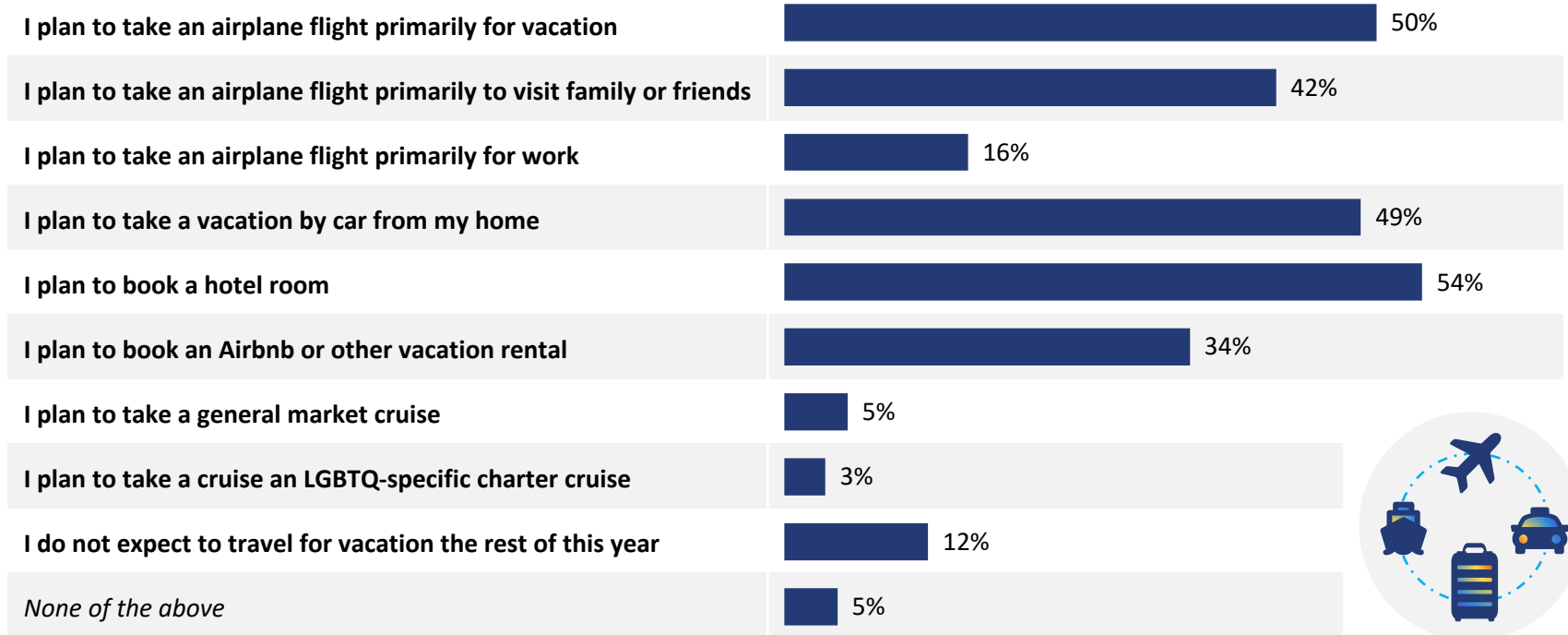
7

**LGBTQ  
Travel**



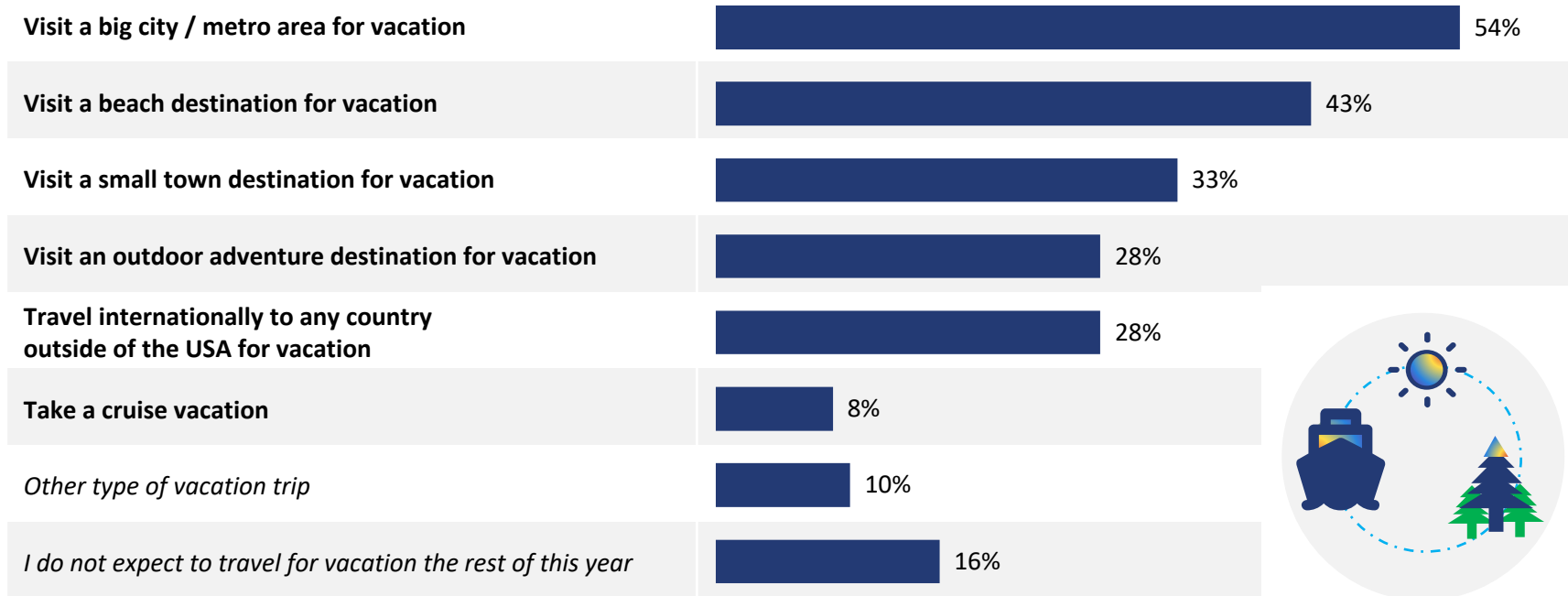
## Travel Plans for the 2022

Q: What are your likely travel plans between now and Dec 31, 2022? Please mark all that apply.



## Types of Destinations

**Q: For the rest of the year (today to December 31, 2022), to which types of destinations are you likely to travel for vacation (not for business)? Please mark all that apply.**



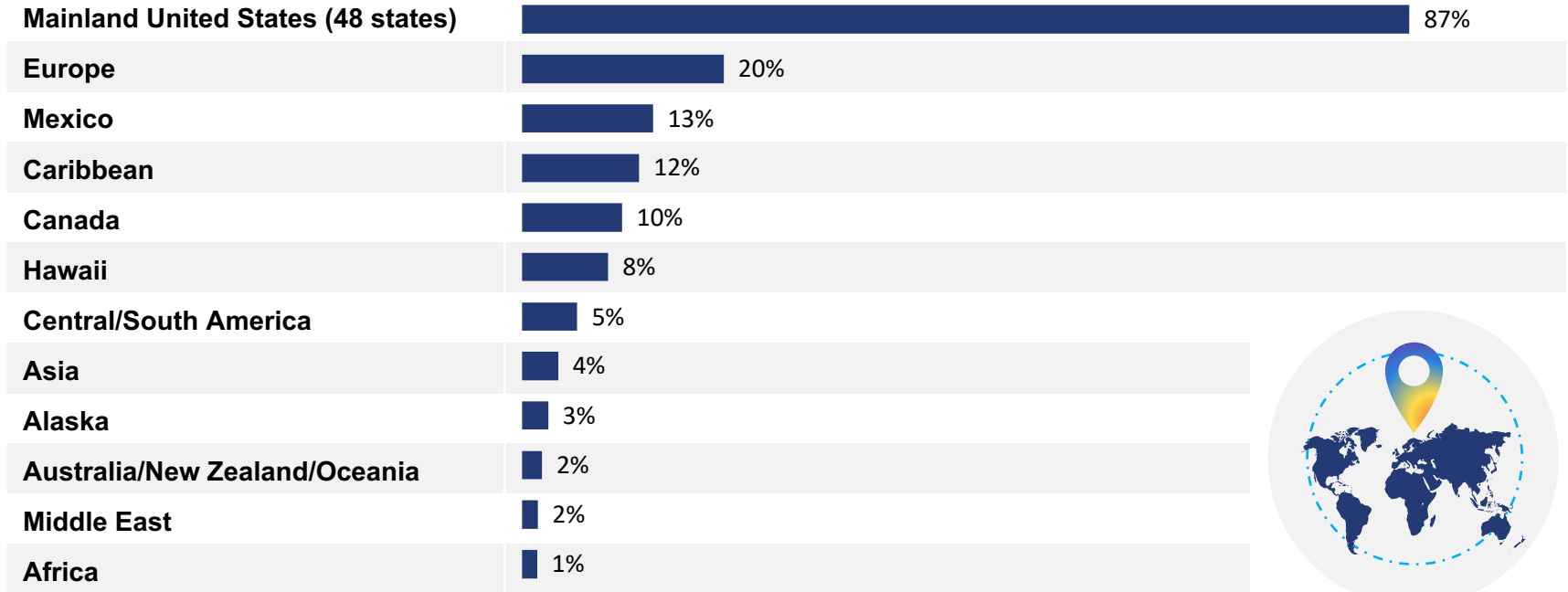


## Destination Priorities

Q: For the rest of the year (today to December 31, 2022), where do you plan to travel?

Please mark all that apply.

Among Participants Planning to Travel



## Feelings of Safety

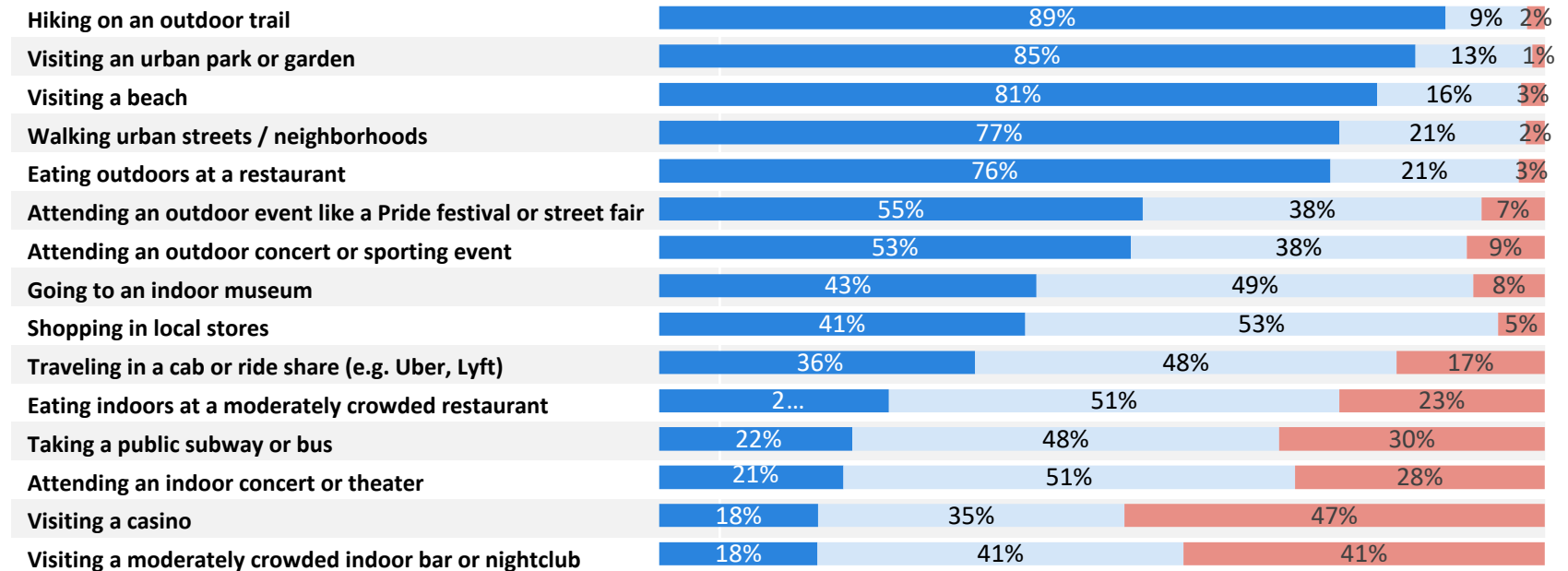
Q: Regardless of your travel plans, how safe and comfortable do you feel about flying on an airplane in relation to COVID-19?

	Cisgender Lesbian & Bi Women	Cisgender Gay & Bi Men	Transgender & Non-Binary Participants
Very safe and comfortable	11%	29%	10%
Mostly safe and comfortable	30%	35%	25%
Somewhat safe and comfortable	35%	23%	31%
Not safe and comfortable	25%	13%	34%

## Types of Travel Activities and COVID-19

**Q: Right now, how safe and comfortable do you feel participating in these types of activities as they relate to COVID-19?**

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



From the Archives

# 15<sup>th</sup> Annual LGBTQ Community Survey<sup>®</sup>

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**LGBTQ Health**



## 2021 Results: 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 (By Age Group)

#### 18-34

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%

#### 35-54

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%

#### 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

## 2021 Results: Most Important LGBTQ Community Health Concerns

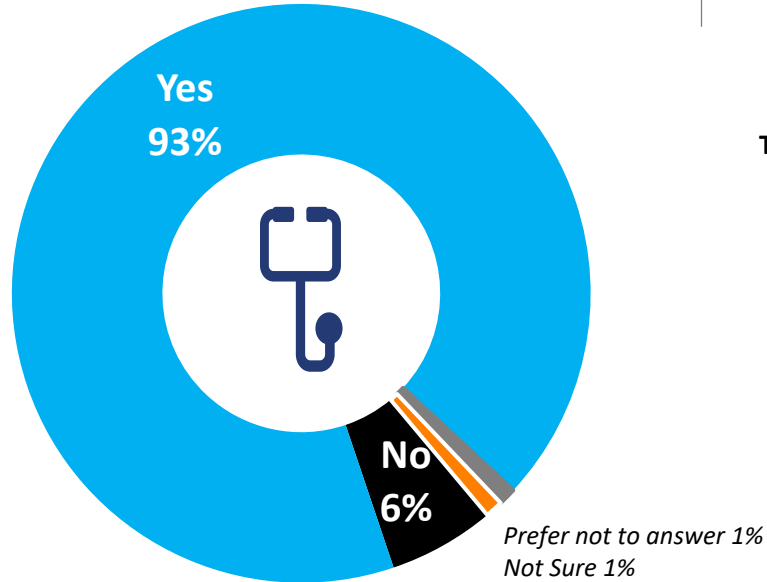
Cisgender Lesbian & Bi+ Women			
(By Age Group)	18-34	35-54	55+
Depression, anxiety or other mental health concern	87%	Depression, anxiety or other mental health concern	73%
Preventing or treating COVID-19	53%	Getting to a healthy body weight	58%
Sleep issues or improving sleep	47%	Preventing or treating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

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

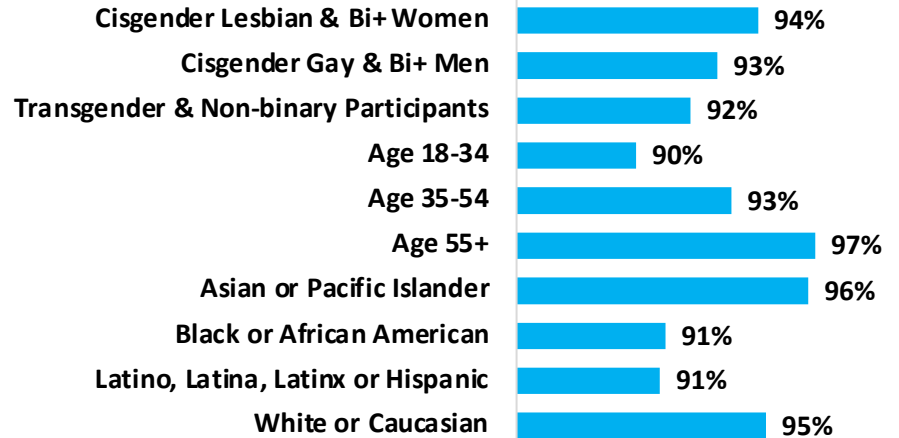
## 2021 Results: Health Coverage

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

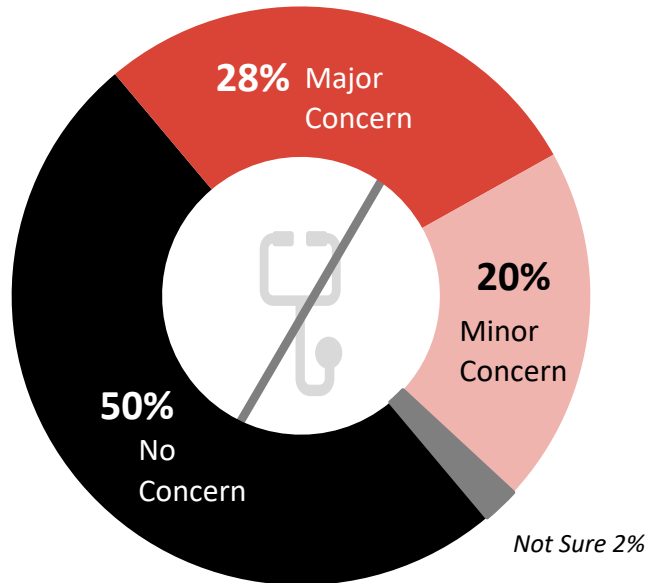


## 2021 Results: Concerns About Losing Health Coverage

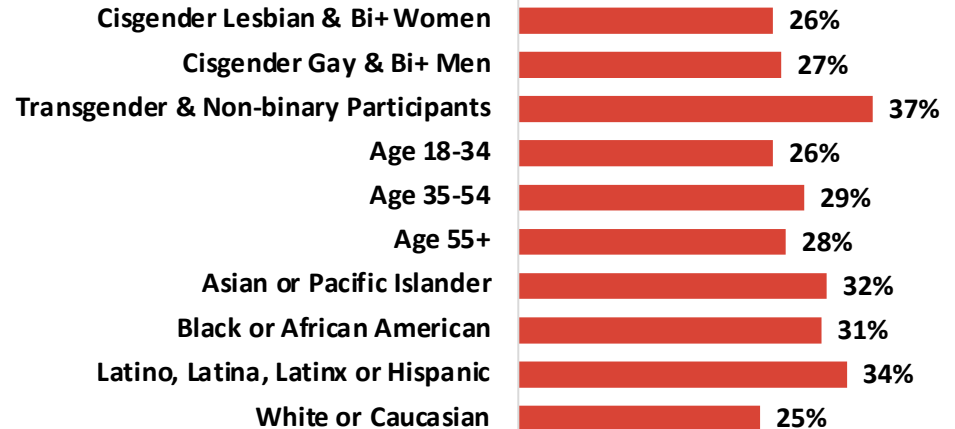
Forty-eight percent (48%) of all participants reported some concern about losing their healthcare. That concern is highest among transgender and non-binary community members. Black, Latinx and Asian LGBTQ participants had greater concerns than White participants.

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

All LGBTQ



Major Concerns by Demographic





## FOR MORE INFORMATION:

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CMI's highly specialized services are based on 30 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

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<http://www.cmi.info/> @LGBTQinsights

*For more information, please contact*

*David Paisley, Senior Research Director*

[david@CMI.info](mailto:david@CMI.info)

# LGBTQ Market Research:

## *There is a difference!*

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

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

### **CMI'S PROPRIETARY PANEL**

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

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

### **LGBTQ PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO "LGBTQ MARKET"**

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

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

### **CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS**

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

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

## **GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH**

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

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

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

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

## **IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!**

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

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

## **VALUE FOR THE INVESTMENT**

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBTQ market intelligence, however, and the cumulative 70+ years of LGBTQ-dedicated experience among the CMI team, we're able to keep your costs within budget. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 30 years.

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

## **WE ARE TRUSTED. WHY THIS IS IMPORTANT:**

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

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

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



# CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

## LGBTQ Research Panel

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with over 30 years of dedicated experience conducting LGBTQ consumer surveys, focus groups, in-depth interviews, advisory boards, consulting services and training. We skillfully assist our clients with strategies, tactics and cost-effective plans based on research results and case study experience.

CMI's PANEL CONSISTS OF OVER 49,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



**44,000**  
LGBTQ Panelists  
in the USA



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



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

**15,000**  
Lesbian and  
Bi+ Women



**24,000**  
Gay and  
Bi+ Men



Participants in all 50 states  
Including rural communities

**5,000**  
Transgender  
and Non-binary  
Community  
Members



**7,000**  
Bisexual and  
Pansexual  
Community  
Members



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



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

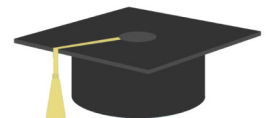
**35%**  
Representing  
LGBTQ  
Communities  
of Color



**33%**  
Under Age  
35



**50%**  
With a BA or  
Higher



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



**20%**  
Legally Married



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



FOR MORE INFORMATION ON CMI'S LGBTQ RESEARCH CAPABILITIES, PLEASE VISIT [WWW.CMI.INFO](http://WWW.CMI.INFO)  
CONTACT THOMAS ROTH at [tom@cmi.info](mailto: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	 FreddieMac We make home possible®	 CDC CENTERS FOR DISEASE CONTROL AND PREVENTION	 U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT	 FDA
 nielsen	 qualtrics	 Ipsos	 GfK	 ICF INTERNATIONAL®	 C+R RESEARCH

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



The National LGBT Chamber of Commerce

Hereby Recognizes:

**Community Marketing & Insights**

As a Certified LGBT Business Enterprise™

(LGBTBE)



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Justin G. Nelson  
Co-Founder & President



---

Chance E. Mitchell  
Co-Founder & CEO

nglcc   
Certified LGBTBE