

 **CMI Community Marketing & Insights**
Community Marketing, Inc.

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



Canada Report • July 2017

In Partnership with





ABOUT CMI: 25 YEARS OF LGBT INSIGHTS

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

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

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

ABOUT CMI's 11th ANNUAL LGBT COMMUNITY SURVEY

ASSUMPTIONS & METHODOLOGY

INVITATION TO PARTICIPATE

Over 180 study partners participated in recruiting LGBT community members to complete the full survey. Of those, 40 (both Canada and USA-based media), provided Canadian responses. A full list is included in the report.

Partners included LGBT media, events and organizations. Partners used a combination of print ads, digital ads, apps, membership email broadcasts and social media for recruitment.

GLOBAL SURVEY RESPONDENTS

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



CANADA RESPONDENTS

This report focuses on the Canadian data for 1,629 self-identified gay and bisexual men, 353 lesbian and bisexual women, and 118 transgender/gender expansive community members; age range 19 to 75. See next page for weighting assumptions.

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

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

Making a Difference is Easy.

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

LGBTsurvey.com

 **CMI Community Marketing & Insights**
Community Marketing, Inc.

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

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

ABOUT CMI'S 11th ANNUAL LGBT COMMUNITY SURVEY

ASSUMPTIONS & METHODOLOGY

IDENTITY

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

RECRUITMENT SOURCES

Survey respondents are recruited through CMI's proprietary LGBT research panel and in partnership with 180+ global LGBT media, events and organizations. Study participants are community members who are interacting with the LGBT community, and who can be reached through LGBT events, organizations and media communications. Because study partners do not necessarily attract LGBTs in proportionate gender and generational ratios, the report presents the data by demographic segments. Statistics presented in the report have been weighted, and divided into nine cohorts based on their gender identity and generation. Identity data presented includes gay and bisexual men, lesbian and bisexual women and gender expansive. Generations reported include Millennial plus (born 1981-1998), Generation X (born 1965-1980) and Baby Boomer Plus (born 1942-1964). The presentation of findings from the three identities and the three generations produces the nine sub-groups.

SEGMENTATION & WEIGHTING

Typically, data is presented by demographic group, as CMI emphasizes that gender and generation distinctions are often more informative than “all LGBT” results. However, when the report does present an “all LGBT” result, it is based on two broad weighting assumptions: First, each of the three generations are equally weighted; and second, gay and bisexual men make up 46% of the community, lesbian and bisexual women make up 46% of the community and those with a gender expansive identity make up 8% of the community. CMI allocated these percentages in an effort to balance the perspectives by gender and generation and based on a review of other research attempting to identify the percentages that make up the L, G, B, and T.

The survey's Gender Expansive category includes participants who identify as transgender, trans men, trans women, genderqueer, gender fluid, non-binary (gender) and/or intersex.

CMI acknowledges that the bisexual men and women in our survey do not represent the *entire* bisexual population. They represent bisexual people who are being reached through, and engaged with, LGBT media, events and organizations. Because of the recruitment sources, results do not show substantive differences between gay vs. bisexual men, or lesbian vs. bisexual women, which is the reason we combine into one category.

A CMI's 11th ANNUAL LGBT COMMUNITY SURVEY • RESEARCH PARTNERS ATTRACTING CANADIAN RESPONSES

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

- !! Omg Blog !!
- Bear World Media
- Canadian Gay & Lesbian Chamber of Commerce
- DailyXtra.com
- DecorHomme
- DNA Magazine
- Federation of Gay Games
- Fugues Magazine
- Gay City News
- GayCalgary
- GayCities
- GayWhistler.com
- Gayvan.com Travel Marketing
- Greg In Hollywood
- Grindr, LLC
- Guide arc-en-ciel / Quebec Rainbow Guide
- Hornet App
- Infolettre de Fugues / Fugues.com
- instinctmagazine.com
- Joe.My.God.
- Kennethinthe212
- Lesbian.com
- LGBT-Today.com
- LGBTQ Nation
- Metro Weekly
- misterbnb
- Out Post
- Outword
- PASSPORT Magazine
- POZ.com
- PROUD FM
- Q Magazine
- Queerty
- Spartacus Traveler
- Squirt.org
- The Gay & Lesbian Review
- The Pride Guides®
- Towleroad
- Whistler Pride and Ski Festival
- Zip

*Special thanks to our
translation partners!*























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

How do you identify within the LGBTQ community? (Please mark all that apply.)	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Among All LGBT Millennials+ (Weighted by Gender Identity)
Lesbian or Gay Woman	-	81%	19%	35%
Gay Man	89%	-	17%	43%
Bisexual Woman	-	22%	10%	16%
Bisexual Man	14%	-	12%	7%
Same Gender Loving	2%	3%	11%	3%
Transgender	1%	2%	42%	5%
Trans Man	1%	<1%	22%	3%
Trans Woman	<1%	3%	22%	2%
Genderqueer	1%	2%	18%	4%
Gender Fluid	1%	3%	19%	7%
Non-binary (gender)	1%	3%	25%	7%
Non-binary (sexual orientation)	<1%	2%	9%	3%
Queer	6%	16%	37%	18%
Questioning	1%	2%	7%	3%
Intersex	<1%	<1%	2%	<1%
Pansexual	2%	5%	15%	7%
Asexual	1%	1%	8%	3%
Agender	<1%	1%	3%	1%






Bases: Gay & Bisexual Men n=1,629; Lesbians & Bisexual Women n=353; Gender Expansive n=118; All LGBT Millennials+ n=551

Canadian Study Participants and Relationship Status: Gay and bisexual men are more likely than lesbian and bisexual women to define themselves as single. Lesbian and bisexual women are more likely than gay and bisexual men to be legally married. For the first time, CMI added the following options: polyamorous relationship, and divorced from a same-sex spouse.

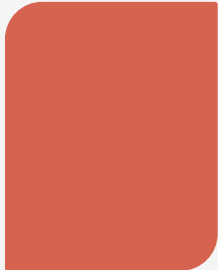
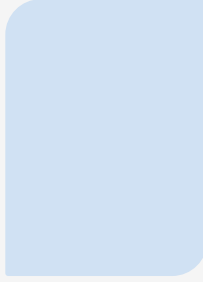
Which of the following best describes your current relationship status? (Please mark all that apply.)	Gay & Bisexual Men	Lesbians & Bisexual Women
Single / not in a relationship	 42%	 29%
In a relationship and living with partner (no legal status)	 18%	 16%
In a relationship but not living with partner (dating)	 10%	 10%
Legally married	 19%	 32%
Civil union or registered domestic partner	 8%	 7%
Engaged	 2%	 3%
Widow / Widower	 2%	 2%
Divorced from same-sex spouse	 2%	 3%
Divorced from opposite-sex spouse	 3%	 3%
Polyamorous relationship	 1%	 2%

Canadian Research Participants and Children

Do you have children? (Please mark all that apply.)	Gay & Bisexual Men			Lesbians & Bisexual Women			Gender Expansive		
	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+	Millennials+	Gen X	Boomers+
Yes, children under age 18 living in my home.	3%	6%	1%	4%	17%	6%	2%	11%	3%
Yes, children under age 18 not living in my home.	1%	4%	2%	1%	2%	1%	2%	0%	0%
Yes, children over age 18.	0%	8%	27%	0%	9%	40%	0%	14%	55%
No	96%	85%	70%	95%	75%	55%	95%	75%	42%
Prefer not to answer	1%	0%	0%	1%	0%	1%	2%	0%	0%

# of Children Under 18 Living at Home	Among All LGBT Parents of Children Under 18
 1	 51%
2	 35%
3	 12%
4+	 3%

Do you want to have children in the future? (Please mark all that apply.)	Millennial+ Non-parents		
	Gay & Bi Men	Lesbian & Bi Women	Gender Expansive
Yes, in the next three years.	9%	21%	2%
Yes, four or more years from now.	35%	27%	21%
No	32%	25%	36%
Unsure	27%	29%	41%



Where We Live: Perceptions of Community LGBT-Friendliness

LGBT-friendly Perceptions of Country, State and Community: LGBT Canadians are far more likely than LGBT United States residents to consider their country LGBT-friendly. However, that difference starts to even out when asked about their local communities. What is interesting is that in Canada, the percentage is highest for county, followed by province, then local community. In the United States it is opposite; the percentage is highest for local community, followed by state, then country last.

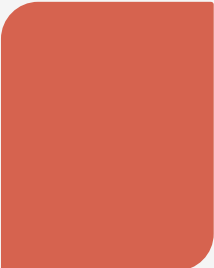
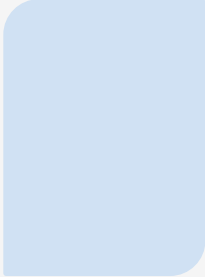
Do you agree or disagree with these statements?  		Country Breakout	
		USA	Canada
I live in an LGBT-friendly city, town, or community.	Agree	82%	89%
	Disagree	18%	11%
I live in an LGBT-friendly state or province.	Agree	66%	92%
	Disagree	34%	8%
I live in an LGBT-friendly country.	Agree	56%	98%
	Disagree	44%	2%

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

LGBT-friendly Perceptions by Gender and Generation: As to whether LGBT Canadians perceive their country, province or community as LGBT-friendly, the survey did not identify substantive differences by gender or generation. What is striking are the high positives from the Canadian gender expansive participants, in stark contrast to the United States results (Canada 96% vs. USA 44%).

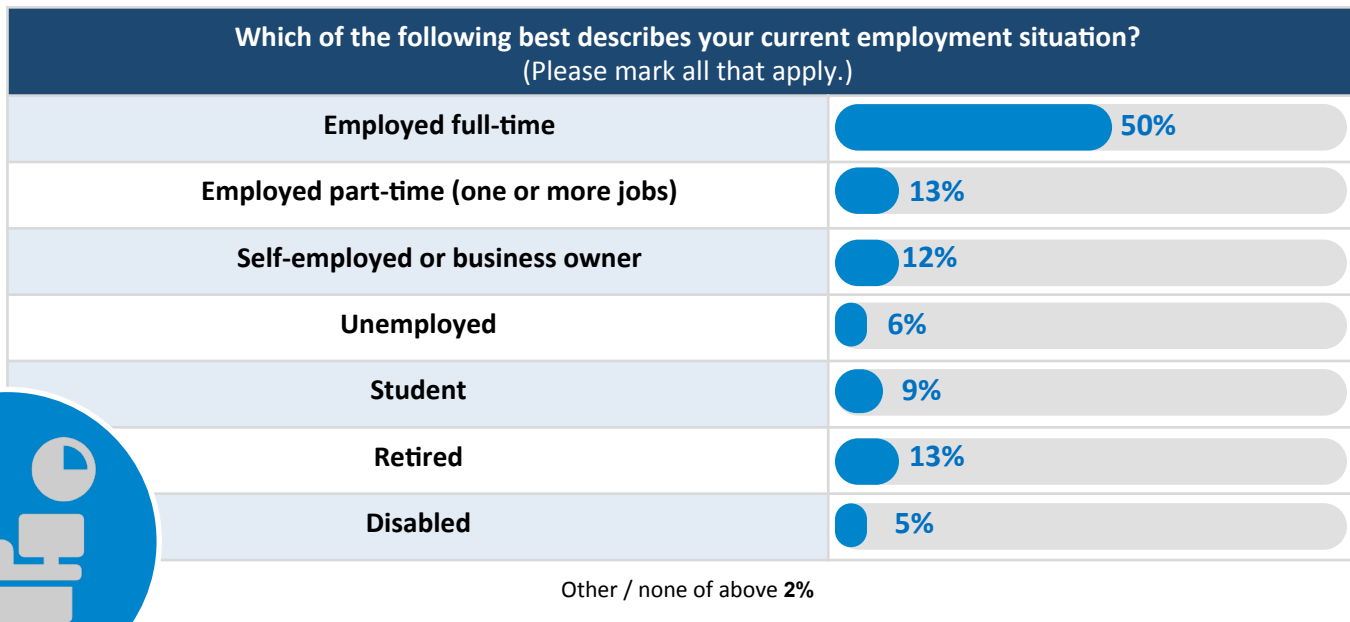
Do you agree or disagree with these statements?		Canada Gender Breakout			Canada Generation Breakout		
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
I live in an LGBT-friendly city, town, or community.	Agree	90%	90%	85%	91%	89%	89%
	Disagree	10%	10%	15%	9%	11%	11%
I live in an LGBT-friendly state or province.	Agree	93%	89%	87%	89%	89%	95%
	Disagree	7%	11%	13%	11%	11%	5%
I live in an LGBT-friendly country.	Agree	98%	99%	96%	98%	98%	99%
	Disagree	2%	1%	4%	2%	2%	1%

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



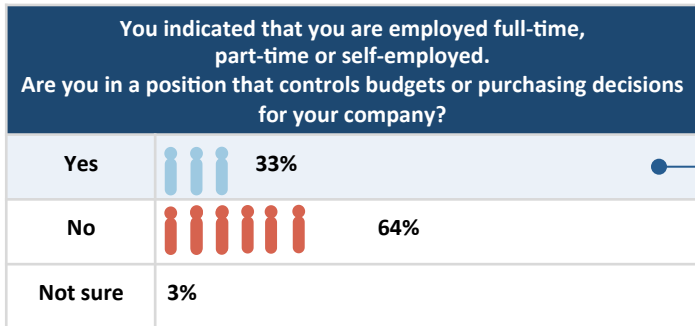
LGBT Employment And Business Owners

Employment: LGBT participants have a wide variety of employment situations. The survey wanted to look at business spending implications for Canadian participants who control budgets for their employers.

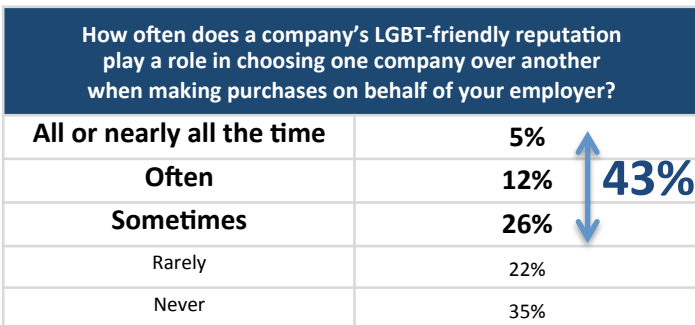


Power of LGBT Business Spending: Many studies have focused on the power of LGBT consumer spending. This question looks at LGBT spending from a different perspective: LGBT community members who control budgets for their employers. As indicated in charts below, being an LGBT-friendly company influences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

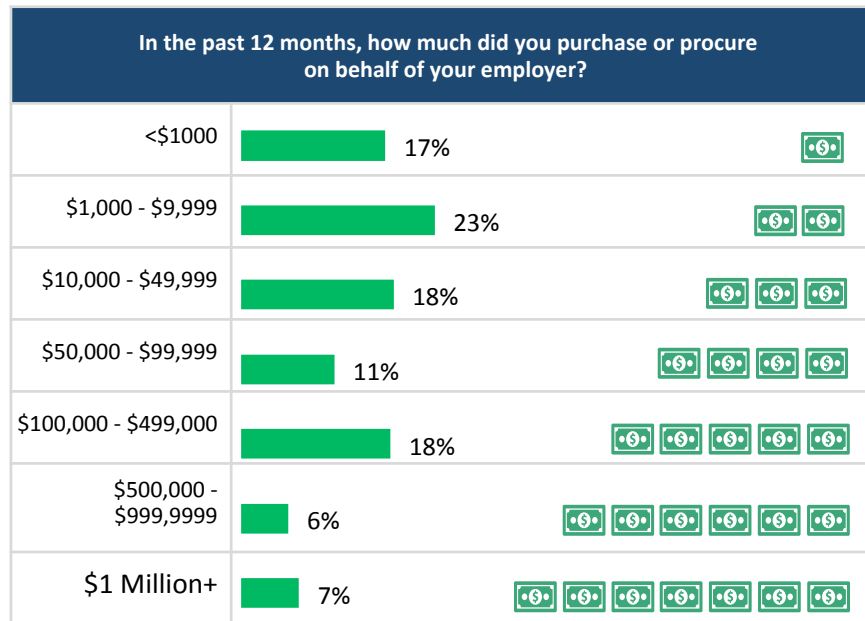
AMONG THOSE EMPLOYED OR OWN BUSINESS



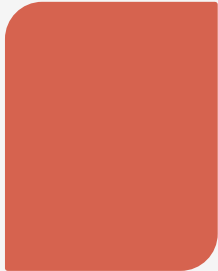
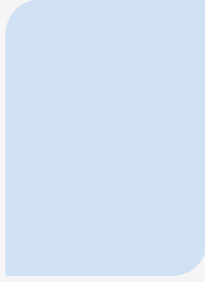
AMONG BUDGET CONTROLLERS



AMONG BUDGET CONTROLLERS

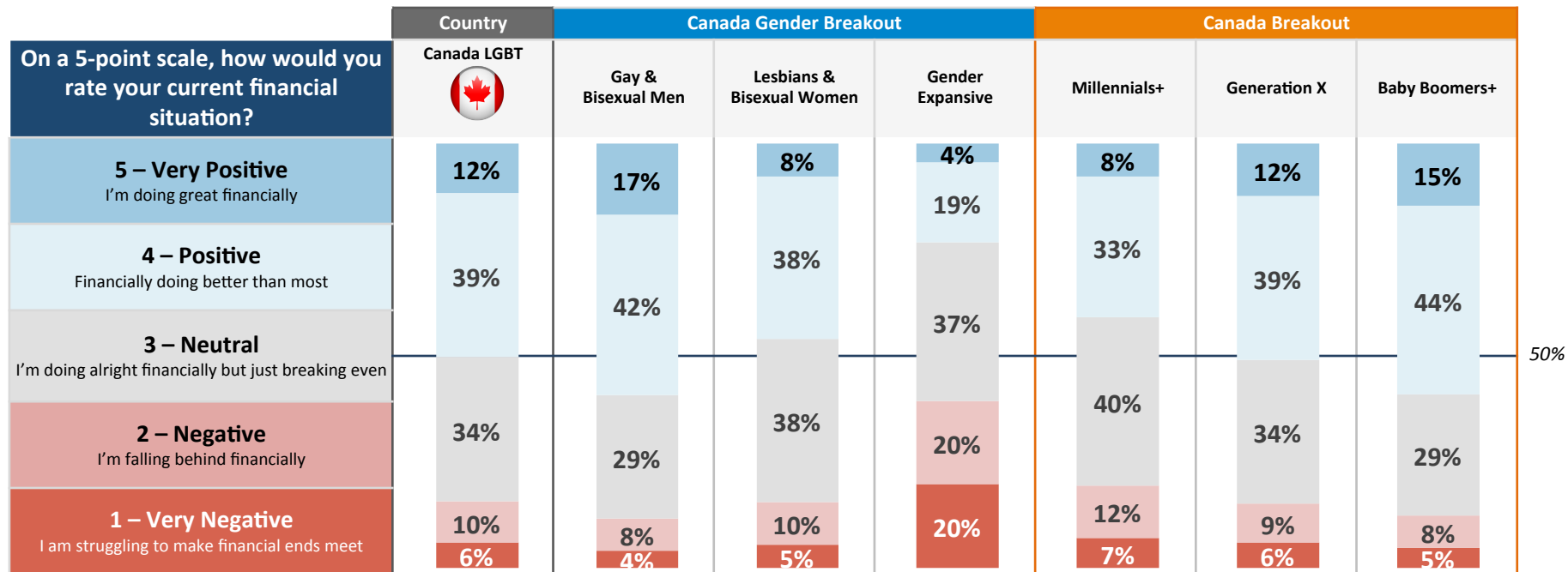


Bases: Canada n=2,100; Canada (Employed Full-time, Part-time, or by Self) n=1,496; Canada (Employed & Control Budgets) n=517














LGBT Consumer Purchasing

LGBT Economic Outlook: The LGBT community generally has a positive economic outlook, with 51% viewing their economic situation positively, 34% neutrally, and 16% negatively. Economic confidence between Canadian and United States participants was the same. Among Canadian participants, there are clear gender and generational differences in economic confidence.



Base: All LGBT Canada n=2,100;
 Gay & Bisexual Men n=1,629; Lesbian & Bisexual Women n=353; Gender Expansive n=118;
 Millennials+ n=551; Gen X n=666; Boomers+ n=883

Items Purchased in the Past 12 Months

Have you (or you and your partner) purchased any of the following major items during the past 12 months? (Please mark all that apply.)	Country	Canada Gender Breakout			Canada Generation Breakout		
	Canada LGBT 	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 A new smartphone	46%	51%	42%	42%	47%	49%	41%
 A new laptop or desktop computer for personal use	30%	32%	29%	31%	27%	29%	36%
 Major piece of furniture (U.S. \$500 or more)	23%	27%	21%	14%	22%	26%	22%
 Audio or visual electronics for home (U.S. \$500 or more)	19%	25%	15%	12%	20%	19%	20%
 Purchased (or leased) a new automobile	18%	17%	19%	14%	13%	18%	22%
 A new suit, dress or expensive clothing item (U.S. \$500 or more)	17%	23%	12%	9%	16%	18%	16%
 Major kitchen appliances (U.S. \$500 or more)	12%	13%	12%	7%	7%	12%	17%
 Major home remodel	11%	12%	11%	8%	4%	13%	16%
 Purchased a new primary home or condo	7%	6%	7%	6%	6%	4%	9%
 Purchased a vacation home or timeshare	3%	3%	3%	2%	2%	3%	3%
None of the above	25%	21%	27%	35%	25%	24%	27%


Base: All LGBT Canada n=2,100;

Gay & Bisexual Men n=1,629; Lesbian & Bisexual Women n=353; Gender Expansive n=118;

Millennials+ n=551; Gen X n=666; Boomers+ n=883

Experiences Purchased in the Past 12 Months



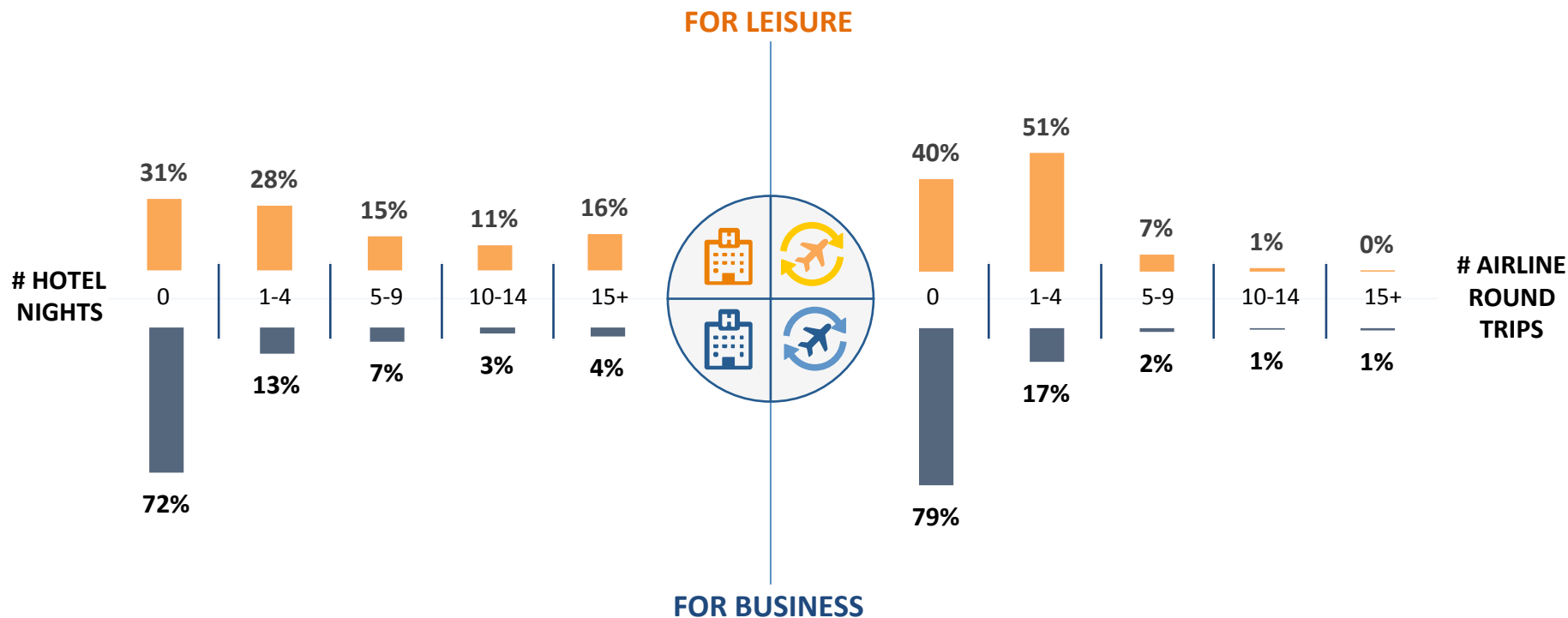
Have you purchased any of the following experiences during the past 12 months? (Please mark all that apply.)	Country	Canada Gender Breakout			Canada Generation Breakout		
	Canada LGBT 	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
Longer vacation of 4+ nights away	53%	58%	51%	41%	51%	56%	53%
Short vacation of 1 to 3 nights away	51%	54%	50%	35%	54%	52%	45%
Tickets to a live theater production	45%	46%	47%	27%	41%	44%	49%
Salon services or spa treatments	42%	40%	46%	34%	44%	47%	36%
Tickets to a headliner music concert or music festival	38%	38%	41%	25%	44%	39%	31%
Tickets to a cultural performance (e.g. ballet, opera, symphony)	36%	40%	35%	24%	38%	35%	36%
Tickets to a professional sports team game	22%	19%	25%	19%	24%	26%	15%
Tickets to a non-profit fundraising event Of \$100 or more	14%	15%	13%	14%	10%	13%	19%
None of the above	15%	14%	13%	30%	14%	14%	17%

Base: All LGBT Canada n=2,100;
Gay & Bisexual Men n=1,629; Lesbian & Bisexual Women n=353; Gender Expansive n=118;
Millennials+ n=551; Gen X n=666; Boomers+ n=883

Leisure and Business Travel












In the past 12 months, about how many of the following travel products did you purchase in the following categories?









Bases: Canada n=2,100

Financial Services and Insurance Products

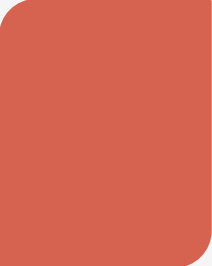
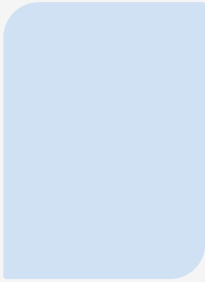
Do you own any of the following financial or insurance products? (Please mark all that apply.)		Canada Gender Breakout			Canada Generation Breakout		
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
	Checking account	92%	90%	86%	89%	92%	90%
	Home insurance	64%	60%	38%	34%	65%	81%
	Car insurance	64%	69%	46%	46%	68%	80%
	Registered Retirement Savings Plan	61%	53%	30%	37%	60%	67%
	Tax-Free Savings Account	55%	49%	39%	51%	49%	53%
	Life insurance	53%	48%	31%	35%	58%	55%
	Premium-level credit card	50%	38%	30%	31%	48%	50%
	Home mortgage	34%	34%	20%	18%	42%	38%
	Student loans	16%	21%	27%	42%	14%	2%
	<i>None of the above</i>	2%	3%	3%	3%	2%	2%

Bases: Gay & Bisexual Men n=1,629; Lesbians & Bisexual Women n=353; Gender Expansive n=118; Millennials+ n=551; Gen X n=666; Boomers+ n=883

Alcohol Consumption

Age 21+ and consumed at least 1+ alcohol drinks in the past 7 days (at home, restaurant, bar)		Gay & Bisexual Men			Lesbians & Bisexual Women		
		Millennials	Gen X	Boomers+	Millennials+	Gen X	Boomers+
	Beer	47%	44%	37%	42%	32%	27%
	Clear spirits (like Vodka, Gin)	43%	39%	28%	37%	26%	21%
	Red wine	35%	42%	42%	26%	29%	27%
	White wine	33%	38%	34%	24%	19%	35%
	Dark spirits (like Bourbon, Whiskey)	28%	23%	20%	28%	15%	9%
	Light beer	10%	8%	11%	14%	6%	19%

Bases (Age 21+): Gay & Bisexual Men (Millennials+ n=317, Gen X n=536, Boomers+ n=766)
Lesbians & Bisexual Women (Millennials+ n=155, Gen X n=102, Boomers+ n=86)



Political Change

LGBT Movement Priorities by Demographic

This section explores the importance of various LGBT political and social concerns, and their importance by demographic within the LGBT community.

Top 4 Canadian Concerns with Broad Support


1. LGBT youth, anti-bullying and/or teen suicide issues
2. International LGBT rights
3. Stopping anti-LGBT “religious freedom” legislation
4. Transgender rights

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

- ✓ **Transgender rights** was the top concern for participants that identify as gender expansive.
- ✓ **HIV education and care** remains a priority for gay and bisexual men.
- ✓ **Protecting LGBT youth, anti-bullying and/or teen suicide issues** was a top concern for Millennials.
- ✓ **Expanding LGBT senior care** was a top concern for Baby Boomers.
- ✓ **Reducing the social & legal obstacles of LGBT parenting** was a top concern for Millennials, which is interesting since most Millennial are not parents (but a large number want to be parents in the future).

Base: All LGBT Canada n=2,100;
Gay & Bisexual Men n=1,629; Lesbian & Bisexual Women n=353; Gender Expansive n=118;
Millennials+ n=551; Gen X n=666; Boomers+ n=883

LGBT Movement Priorities by Gender and Generation

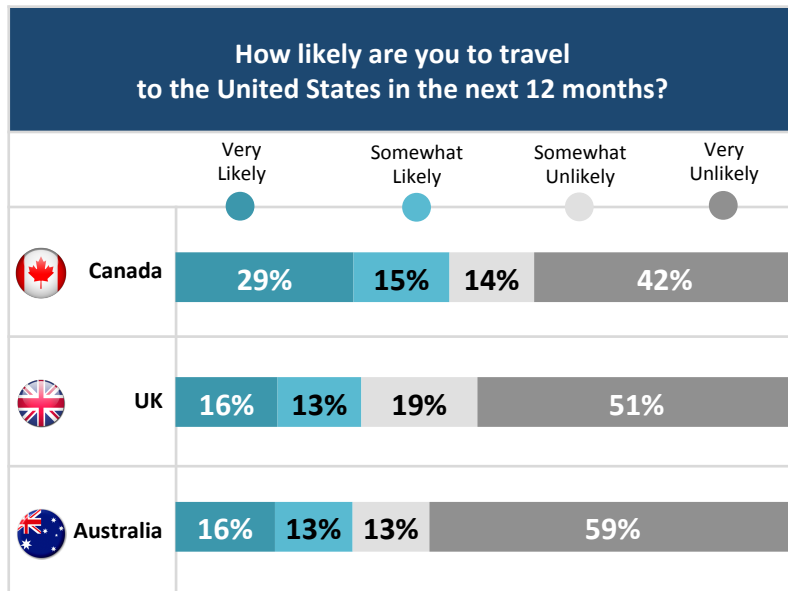
What are your priorities for the LGBT movement for the next 10 years? Please check the LGBT causes that motivate you to volunteer, donate, support, get involved, etc.	Country	Canada Gender Breakout			Canada Generation Breakout		
	Canada LGBT 	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
LGBT youth, anti-bullying and/or teen suicide issues	62%	58%	67%	60%	71%	63%	53%
International LGBT rights	50%	49%	52%	44%	55%	53%	42%
Stopping anti-LGBT “religious freedom” legislation	42%	38%	45%	45%	46%	41%	38%
Transgender rights	41%	25%	49%	81%	50%	42%	30%
Expanding LGBT senior care	39%	36%	41%	44%	20%	38%	59%
Workplace equality	36%	31%	40%	42%	42%	38%	28%
Supporting LGBT-friendly political candidates	34%	33%	34%	36%	30%	33%	38%
Ethnic / racial equality within the LGBT community	32%	26%	37%	37%	39%	31%	25%
Protecting and expanding marriage equality	30%	24%	37%	31%	34%	30%	27%
Supporting LGBT political candidates	29%	26%	31%	35%	31%	27%	29%
Expanding LGBT roles, visibility and influence in rural areas	28%	24%	31%	32%	35%	27%	21%
Reduce the social & legal obstacles of LGBT parenting	26%	21%	31%	28%	40%	23%	14%
HIV education and care	26%	38%	14%	24%	33%	25%	19%
Expanding LGBT roles and influence in sports communities	16%	15%	17%	21%	21%	17%	11%
Expanding LGBT roles and influence in religious communities	14%	11%	16%	14%	16%	13%	11%
Breast cancer education and care	7%	4%	9%	12%	8%	7%	6%

Base: All LGBT Canada n=2,100;

Gay & Bisexual Men n=1,629; Lesbian & Bisexual Women n=353; Gender Expansive n=118;

Millennials+ n=551; Gen X n=666; Boomers+ n=883

International Travel to the USA: With participation from around the world, the survey looked at the implications of recent political changes for international travel to the United States. The two questions yielded mixed results. On one hand the intention to travel to the United States was still reasonably high. However, among those not intending to visit, most cited political reasons over practical reasons like money or time away. CMI will revisit this question in 2018 to gauge actual travel to the U.S. among these international travelers.

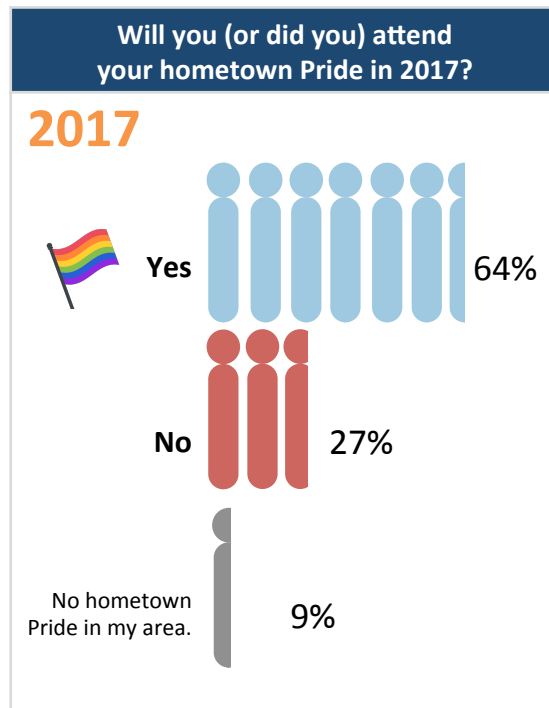
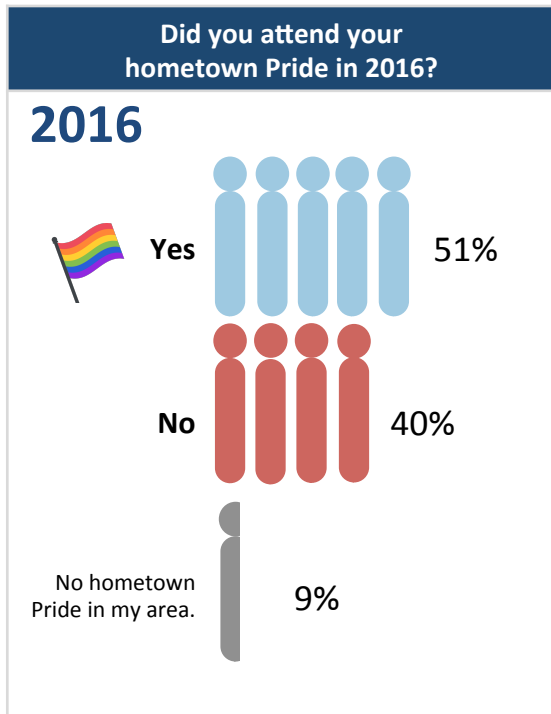


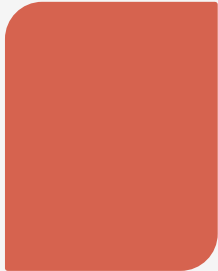
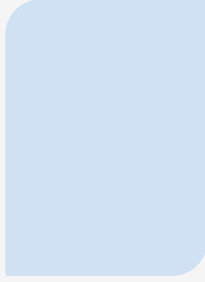
Why are you <u>unlikely</u> to travel the United States in the next 12 months? (Please mark all that apply.)	Country		
	Canada	UK	Australia
The policies of the new U.S. administration / President	79%	63%	65%
I don't feel welcome as an LGBT person	46%	35%	27%
Safety and security concern	38%	23%	28%
Heard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

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

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


The Power of Pride: Interest in attending Pride by Canadian participants remains strong, and research indicates attendance should increase in 2017. 64% of LGBT Canadians surveyed said that they will attend (or already have attended) their hometown Pride in 2017, compared to 51% who attended in 2016.






Terminology

Favorability of Terms: Overall, “LGBT” remains the most popular term to describe the community overall (although LGBTQ is closing fast). CMI also noted that “LGBT-friendly” is more popular than “gay-friendly”, which can now be seen as exclusionary for women and gender expansive community members. The term GLBT has a below 40% favorability rating even among men, and CMI recommends that corporations stop using the term.

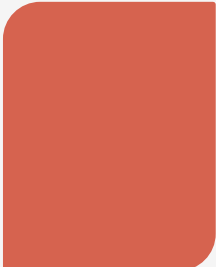
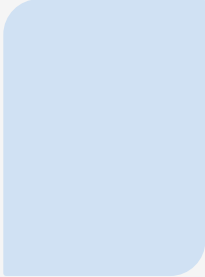
% Favorable Rating 	Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive
		LGBT-friendly	65%	70%
Use of "Rainbow" (the image / graphic)	65%	75%	59%	
Gay-friendly	64%	52%	37%	
LGBT	64%	67%	54%	
Lesbian & Gay	54%	52%	35%	
LGBT-welcoming	54%	59%	48%	
LGBT+	53%	68%	66%	
LGBTQ	53%	72%	59%	
Use of "Rainbow" (the word)	37%	43%	37%	
GLBT	35%	29%	19%	
LGBTQ!	32%	51%	40%	
Queer	30%	45%	41%	

Bases: Vary by Segment and Term. Participants asked to rate each term positive, neutral or negative.

Favorability of Terms: The term “LGBT” is perceived equally favorably across generations (and why CMI continues to use it in this report). However, “LGBTQ” is the preferred term for Millennials, and the term has a 57% approval rating for Baby Boomers. “LGBTQ” gained significant positive response over the past year, especially among gay and bisexual men and Baby Boomers. CMI now views “LGBTQ” to be a positive word for corporations to use today, with little negative downside. This is why CMI continues to use LGBT in this report. Both LGBT and LGBTQ can be used depending on the product or service. LGBT+ has also gained in popularity.

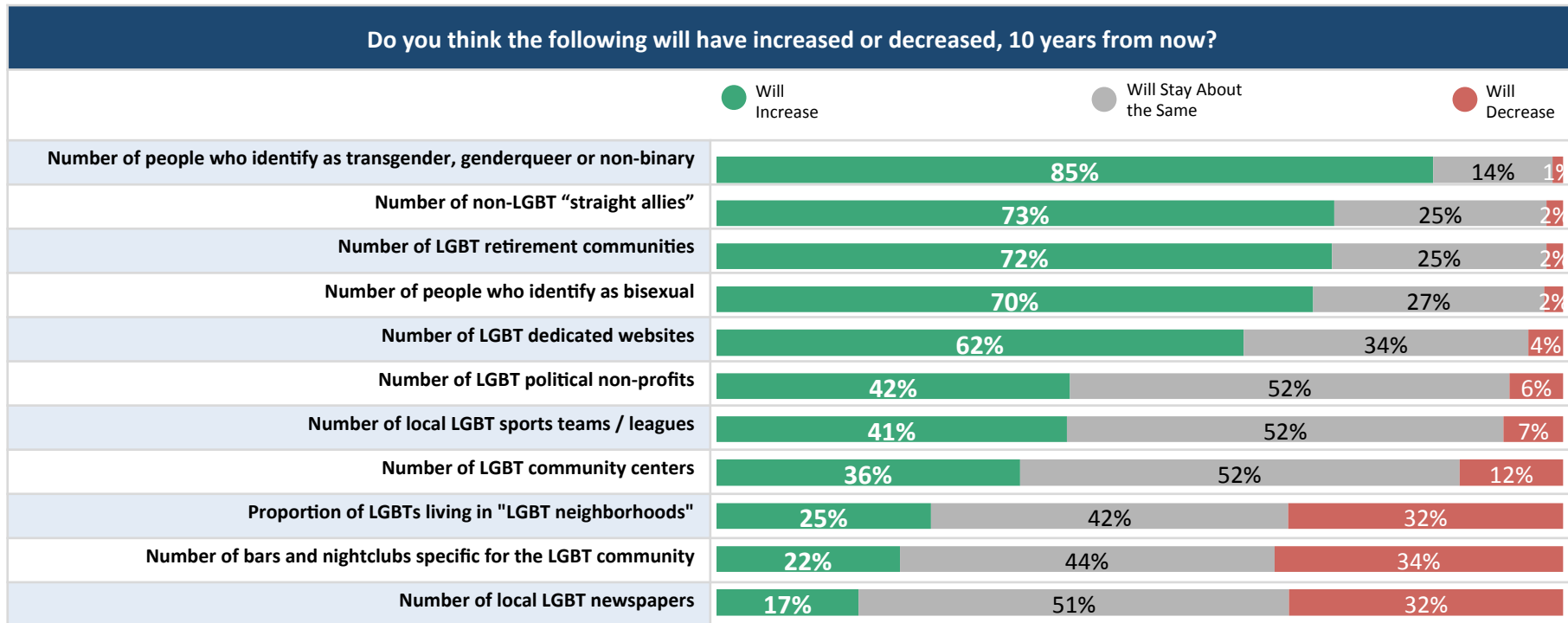
% Favorable Rating 	Please rate how you feel about each, when you see them used by corporations. My opinion of the use of the term in corporate advertising is...	Millennials+	Gen X	Boomers+
		LGBTQ	69%	61%
LGBT+	67%	61%	54%	
LGBT-friendly	67%	66%	68%	
Use of "Rainbow" (the image / graphic)	63%	71%	73%	
LGBT	62%	65%	65%	
LGBT-welcoming	51%	53%	63%	
LGBTQI	50%	39%	36%	
Gay-friendly	48%	56%	64%	
Queer	48%	36%	29%	
Lesbian & Gay	44%	52%	59%	
Use of "Rainbow" (the word)	30%	41%	48%	
GLBT	25%	32%	36%	

Bases: Vary by Segment and Term. Participants asked to rate each term positive, neutral or negative.









LGBT Media and Organizations

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











LGBT Media Interaction (Past 12 Months): Similar to 2016, participants reported increases in digital interaction with LGBT media, while print media interactions are stable over the past year.

Has your interaction with LGBT media (newspapers, websites, etc.) changed over the past 12 months?		Canada Gender Breakout			Canada Generation Breakout			
		Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+	
	Visiting LGBT websites / blogs	Increased	33%	33%	45%	40%	32%	31%
		Same	59%	57%	44%	52%	58%	61%
		Decreased	8%	10%	11%	9%	10%	8%
	Reading LGBT email newsletters	Increased	17%	15%	22%	17%	15%	18%
		Same	70%	74%	65%	73%	71%	70%
		Decreased	13%	11%	13%	9%	14%	12%
	Reading local LGBT newspapers and magazines	Increased	8%	7%	11%	11%	7%	6%
		Same	70%	73%	69%	74%	72%	68%
		Decreased	22%	19%	21%	15%	21%	26%
	Using LGBT dating mobile apps	Increased	23%	13%	28%	25%	20%	13%
		Same	54%	64%	52%	51%	58%	67%
		Decreased	23%	22%	19%	24%	22%	21%
	Reading LGBT national magazines	Increased	9%	6%	11%	10%	6%	7%
		Same	71%	77%	72%	76%	75%	71%
		Decreased	20%	17%	17%	14%	19%	23%
	Using LGBT (all other non-dating) mobile apps	Increased	11%	9%	17%	13%	9%	10%
		Same	70%	73%	66%	72%	72%	69%
		Decreased	19%	19%	17%	16%	19%	21%

Bases: Gay & Bisexual Men n=1,629; Lesbians & Bisexual Women n=353; Gender Expansive n=118; Millennials+ n=551; Gen X n=666; Boomers+ n=883


LGBT Media Interaction (Past 30 Days)

In the past 30 days, have you read any of the following print media...? (Please mark all that apply.)	Canada Gender Breakout			Canada Generation Breakout		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
LGBT publications / newspapers for my city or region	32%	24%	27%	21%	33%	29%
LGBT national magazines	20%	14%	19%	13%	17%	20%

In the past 30 days, have you viewed or listened to any of the following...? (Please mark all that apply.)	Canada Gender Breakout			Canada Generation Breakout		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 LGBT websites / blogs	62%	54%	66%	63%	64%	49%
 LGBT mobile apps (dating or hook-up)	39%	12%	26%	31%	27%	18%
 LGBT email newsletters	34%	28%	26%	23%	32%	36%
 LGBT-dedicated YouTube channels	32%	26%	42%	43%	28%	19%
 LGBT-dedicated TV channels	22%	8%	8%	15%	13%	15%
 LGBT mobile apps (non-dating)	13%	7%	13%	12%	12%	7%
 LGBT radio (on the air or streaming online)	11%	7%	7%	7%	10%	9%
 LGBT audio podcasts	10%	11%	13%	16%	10%	5%
None of the above	16%	27%	19%	16%	20%	28%

Bases: Gay & Bisexual Men n=1,629; Lesbians & Bisexual Women n=353; Gender Expansive n=118; Millennials+ n=551; Gen X n=666; Boomers+ n=883

Social Media Interaction (Past 30 Days)

Do you have, and have actively used (at least once a week), any of these social media and dating websites / apps in the past 30 days? (Please mark all that apply.)	Canada Gender Breakout			Canada Generation Breakout			
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+	
Facebook	80%	89%	83%	92%	85%	75%	
YouTube	73%	69%	71%	81%	70%	61%	
Instagram	44%	44%	41%	69%	40%	21%	
Twitter	36%	37%	33%	43%	40%	26%	
Tumblr	36%	16%	33%	42%	22%	16%	
LinkedIn	32%	30%	26%	32%	36%	24%	
Google+	22%	22%	23%	17%	20%	29%	
Snapchat	21%	22%	18%	46%	13%	4%	
Pinterest	16%	29%	16%	23%	23%	20%	
 Any dating app dedicated to gay men	52%		27%	50%*	55%*	49%*	
	Any dating app for the general population (i.e. not LGBT-specific)	11%	10%	22%	19%	10%	5%
	Any dating app dedicated to lesbians		12%	6%	16%**	13%**	8%**
	None of the above	3%	7%	6%	1%	4%	10%










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

*Among Gay Men ONLY.

** Among Lesbians ONLY.

Bases: Gay & Bisexual Men n=1,629; Lesbians & Bisexual Women n=353; Gender Expansive n=118; Millennials+ n=551; Gen X n=666; Boomers+ n=883

Other Types of LGBT Community Interactions (Past Year)

In the past 12 months, have you viewed or participated in any of the following? (Please mark all that apply.)	Canada Gender Breakout			Canada Generation Breakout		
	Gay & Bisexual Men	Lesbians & Bisexual Women	Gender Expansive	Millennials+	Generation X	Baby Boomers+
 Watched a film with majority LGBT characters	67%	67%	62%	71%	74%	56%
 Watched an LGBT-inclusive TV show	63%	70%	60%	76%	69%	54%
 Visited a bar / nightclub for the LGBT community	51%	34%	44%	49%	48%	29%
 Visited a neighborhood because it is LGBT-popular	41%	32%	30%	40%	40%	28%
 Donated to LGBT organization(s)	25%	25%	15%	20%	25%	28%
 Attended an LGBT organization fund-raiser, gala, etc.	18%	21%	15%	16%	19%	23%
 Volunteered at LGBT organization(s)	14%	17%	20%	17%	18%	12%
 Attended an LGBT film festival	12%	16%	8%	11%	13%	16%
 Attended / participated in an LGBT sports activity	8%	8%	3%	8%	10%	5%
None of the above	13%	11%	12%	8%	10%	17%

Bases: Gay & Bisexual Men n=1,629; Lesbians & Bisexual Women n=353; Gender Expansive n=118; Millennials+ n=551; Gen X n=666; Boomers+ n=883

FOR MORE INFORMATION:

CMI's highly specialized services are based on 25 years of dedicated experience, producing LGBT (lesbian, gay, bisexual, transgender) market intelligence for leading corporate clients and organizations across the country and around the world.

Serving a variety of industries, we leverage our in-house proprietary panel of more than 70,000 community-representative LGBT consumers to produce consumer survey studies, recruit and facilitate focus groups, interviews, etc. Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBT research/sales/marketing/best practices corporate training and conference presentations.

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

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

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*Community Marketing, Inc. is an NGLCC
Certified LGBT-Owned Business Enterprise.*





ABOUT CMI'S LGBTQ RESEARCH PRACTICE

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

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

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

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

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



ABOUT THE CMI RESEARCH PANEL

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

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

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

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

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

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

CMI'S LGBTQ STRATEGIC PLANNING & CORPORATE TRAINING

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

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

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

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



CONTACT US

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

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

LGBT Market Research:

There is a difference!

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

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

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

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

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

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

CMI'S QUANTITATIVE SURVEYS: SIZE DOES MATTER

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

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

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

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

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

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

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

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

GET A DEEPER UNDERSTANDING OF THE LGBT COMMUNITY: QUALITATIVE RESEARCH

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

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

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

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

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

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

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

VALUE FOR THE INVESTMENT

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

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

PROUDLY LGBT-OWNED AND -OPERATED

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

AND PROUD OF OUR COMMUNITY CITIZENSHIP

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

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

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

LGBTQ Panel 2017-2018

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

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



60,000
LGBTQ Panelists
in the USA



7,500
LGBTQ Panelists
in Canada
(English + French Speaking)



4,500
LGBTQ Panelists
in China



Capabilities in the
UK, Germany,
Australia and other
countries



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

20,000+
Lesbian and
bisexual women



30,000+
Gay and
bisexual men



3,000
Transgender
community
members



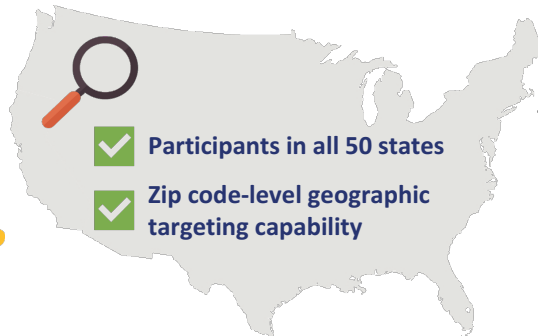
7,000
Bisexual
community
members



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



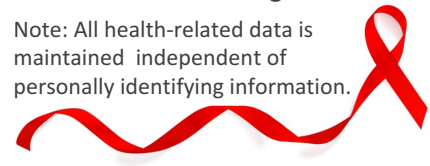
5,000 With an HHI
Below \$25,000



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

Thousands of men living with HIV

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



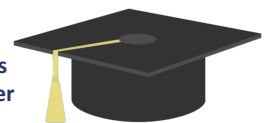
18,000
Representing
the LGBTQ
community
of color



20,000
LGBTQ
Millennials



10,000
With a master's
degree or higher



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



10,000
Legally married
same-sex couples



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

