



**CMI Community Marketing & Insights**

Leaders in LGBTQ Research since 1992

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

USA Report | n= 14,432 | June 2023

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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. Over three decades, we have completed more than 500 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 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, Better Homes & Gardens Real Estate, Centers for Disease Control & Prevention, County of Santa Clara Office of LGBTQ Affairs, CMI Media Group, Destination Canada, DIRECTV, Discover Puerto Rico, Freddie Mac, GLAAD, Google, Greater Miami Convention & Visitors Bureau, Hallmark, Hawai'i Tourism Authority, Human Rights Campaign Foundation, Hulu, IGLTA, Intercontinental Hotel Group, Johnson & Johnson, Kaiser Family Foundation, Las Vegas Convention & Visitors Authority, Marriott, New York Life, NYC & Company, New York State Division of Tourism, Planned Parenthood, Realtor.com, 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 Philadelphia, Visit Salt Lake, Wells Fargo, Wilson Media Group, WNBA, and numerous other corporations and organizations across North America and around the world.

## CMI's 17<sup>th</sup> ANNUAL LGBTQ COMMUNITY SURVEY RESEARCH PARTNERS

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

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to our partners



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#ILoveGay  
Adelante Magazine  
Atlanta Pride Committee  
Autostraddle  
BAR Media, Inc. dba Bay Area Reporter  
Bay Windows  
Between the Lines  
Capitol Ballroom Council, Inc.  
Center for Black Equity  
CenterLink: The Community of LGBTQ Centers  
Connect Media Group  
Dallas Voice | OUT North Texas  
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DDG Media Group  
DECORHOMME  
Desert Business Association, the Coachella  
Valley's LGBTQ Chamber  
Erie Gay News  
FUGUES  
Gay City News  
Gay Desert Guide  
GayCalgary Magazine  
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Pamm Meyers Social Media  
Persad Center (Pittsburgh)  
Philadelphia Gay News  
Pink Media  
POZ  
Pride Guide® USA  
Pride Source  
Q voice news  
Qnotes / QnotesCarolinas.com  
QSaltLake Magazine

Queerty  
QVegas  
Rainbow Chamber of Commerce Silicon Valley  
Rainbow GUIDE Arc-en-ciel  
Real Health  
Sacramento Rainbow Chamber of Commerce  
San Fransico Bay Times  
Santa Clara Office of LGBTQ Affairs  
Seattle Gay News  
Smart + Strong  
South Florida Gay News (SFGN)  
Squirt.org  
Tagg Magazine  
The Guide (Florida)  
The Mirror (Florida)  
Tu Salud  
Utah LGBTQ+ Chamber of Commerce  
Washington Blades  
Watermark Publishing Group  
Windy City Times  
Wisconsin LGBT Chamber of Commerce  
Xtra: LGBTQ2S+ Culture, Politics and Health



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Leaders in LGBTQ Research since 1992

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

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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 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.

## Sample Size and Weighting

This report focuses on the data for 14,432 self-identified LGBTQ community members living in the United States. This includes 9,303 cisgender gay and bi+ men, 3,038 cisgender lesbian and bi+ women, and 2,091 transgender and non-binary community members. 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 to ensure that the results are more balanced and reflective of the community.

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.

Overall, 20,000 respondents across the globe participated in the 2023 survey, which was fielded in English, Spanish, and French. The survey was open to participants for a 70-day period during April to June 2023.

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.

## ABOUT CMI's 17<sup>th</sup> ANNUAL LGBTQ COMMUNITY SURVEY • METHODOLOGY & WEIGHTING

### USA Report

Completes n=14,432 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, 2023 to June 10, 2023

### 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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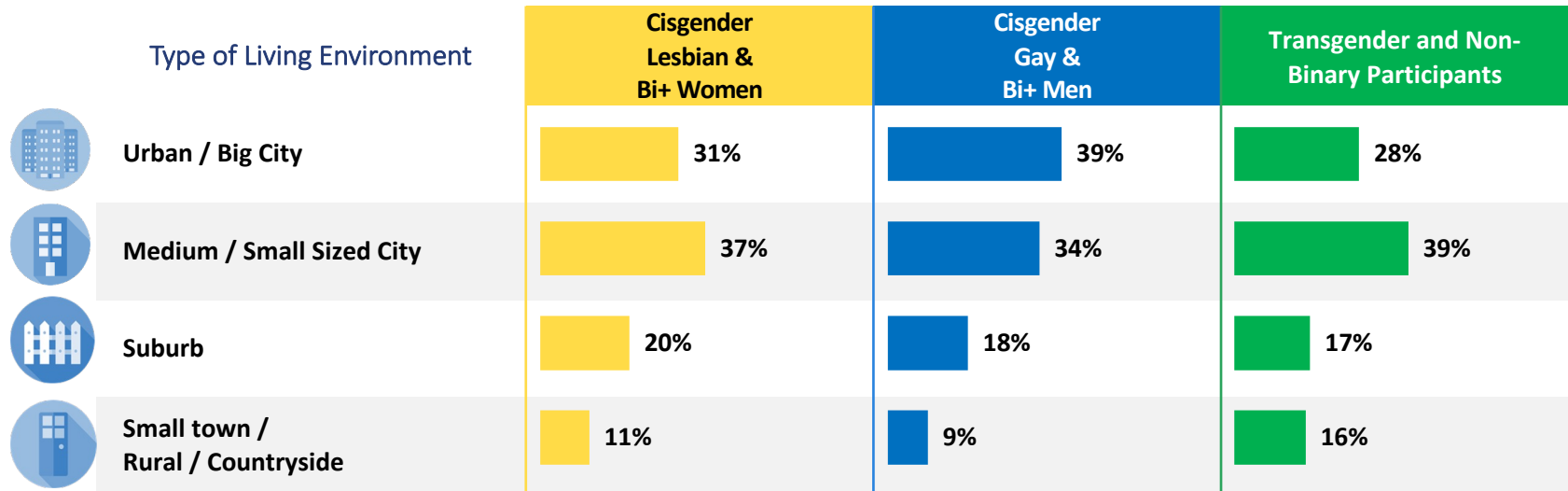
## Understanding LGBTQ Community Demographics



## Type of Living Environment

The most important takeaway here is that LGBTQ community members live in a wide variety of community types and sizes. While cisgender gay and bi+ men have a higher likelihood than other LGBTQs of living in big cities, only 39% live in big city environments. As an annual question, we were able to look at past data to see if COVID-19 caused a major shift in living environments. All data were within one or two percentage points compared to both the 2020 and 2017 LGBTQ Community Surveys. We are not seeing a large LGBTQ migration to smaller-sized communities.

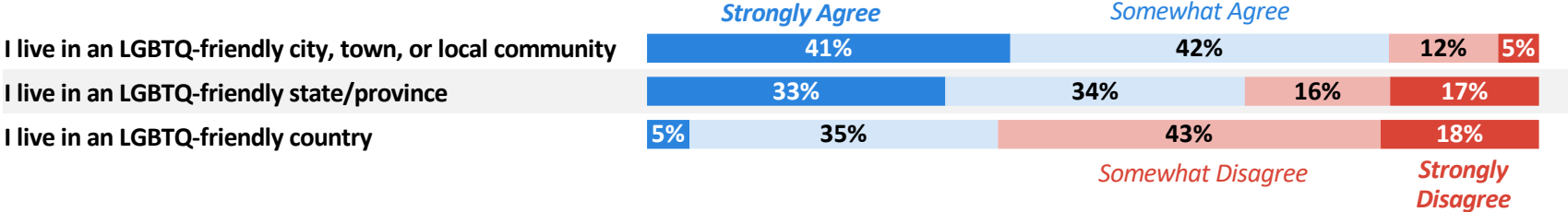
**Q: What type of environment best describes the primary place in which you live?**





# LGBTQ-Friendly Living Environments

To track trends, CMI has been asking this question for several years. The percentage of LGBTQ United States residents thinking that the country is LGBTQ-friendly has plummeted from 56% in 2021 to 41% in 2023. When residents are asked to evaluate their own states, California, New York and Illinois residents continue to feel that their state is very LGBTQ-friendly. The sentiment of Florida residents as living in an LGBTQ-friendly state drastically dropped again this past year. Texas’ self-rating remains negative.



**I live in an LGBTQ-friendly country**  
**40%** of LGBTQ USA residents agree that the United States is an LGBTQ-friendly country  
**96%** of LGBTQ 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 (Same compared to 2022)
- New York:** 97% of residents agreed (Up 1% compared to 2022)
- Illinois:** 95% of residents agreed (Up 4% compared to 2022)
- Georgia:** 32% of residents agreed (Up 6% compared to 2022)
- Florida:** 16% of residents agreed (Down 8% compared to 2022)
- Texas:** 16% of residents agreed (Same compared to 2022)

All LGBTQ n=14,434  
 See methodology for segment bases.

## 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 three 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. Corroborated by 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, travel, 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%	38%	33%
In a relationship but not living with a partner	9%	9%	8%
In a relationship and living with a partner (with no legal status)	13%	13%	13%
Legally married	38%	28%	27%
Civil union, registered domestic partner or common law	1%	2%	2%
Engaged to a partner	3%	2%	2%
Partner deceased and currently single	2%	2%	2%
Divorced and currently single	3%	2%	4%
Polyamorous relationship	2%	1%	6%
Something else	1%	1%	2%
<i>Decline to answer</i>	0%	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%	0%	24%
Male same-sex couple (male-male couple)	0%	95%	19%
Opposite-sex couple (female-male couple)	13%	4%	15%
Non-binary / Transgender couple (where one or both partners identifies as transgender or outside the gender binary)	7%	1%	54%
Queer couple (any gender)	13%	3%	38%
Polyamorous relationship	2%	2%	10%
Something else	1%	0%	2%

## LGBTQ Parents

There are more LGBTQ parents than many might think. In this study, 22% of LGBTQ participants indicated having a child of any age. The percentage of LGBTQ parents of a child under age 18 has been consistent over the past 5 years. Lesbian & bi+ women are the most likely in the LGBTQ community to have children under age 18. We also found a substantial percentage of transgender and non-binary parents.

**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>22%</b>	<b>29%</b>	<b>14%</b>	<b>30%</b>
Yes, I have children under age 18 living in my home	7%	12%	3%	9%
Yes, I have children under age 18 not living in my home	2%	2%	1%	3%
Yes, I have children age 18 or over	12%	16%	8%	18%
<i>Prefer not to answer</i>	1%	1%	1%	2%

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

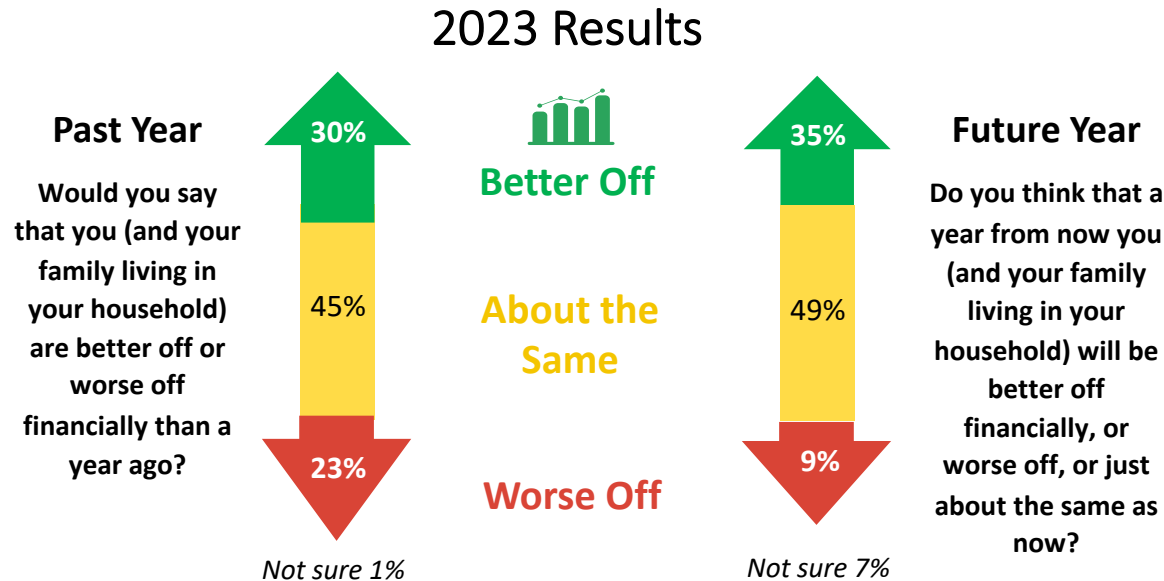


# 18%

of LGBTQ Baby Boomers+  
Have Grandchildren

## Financial Confidence

The survey asks participants multi-year tracking questions about their economic confidence. In general, LGBTQ economic confidence is neutral to slightly positive. Confidence levels are down 2% from last year, however that is within the margin of error.

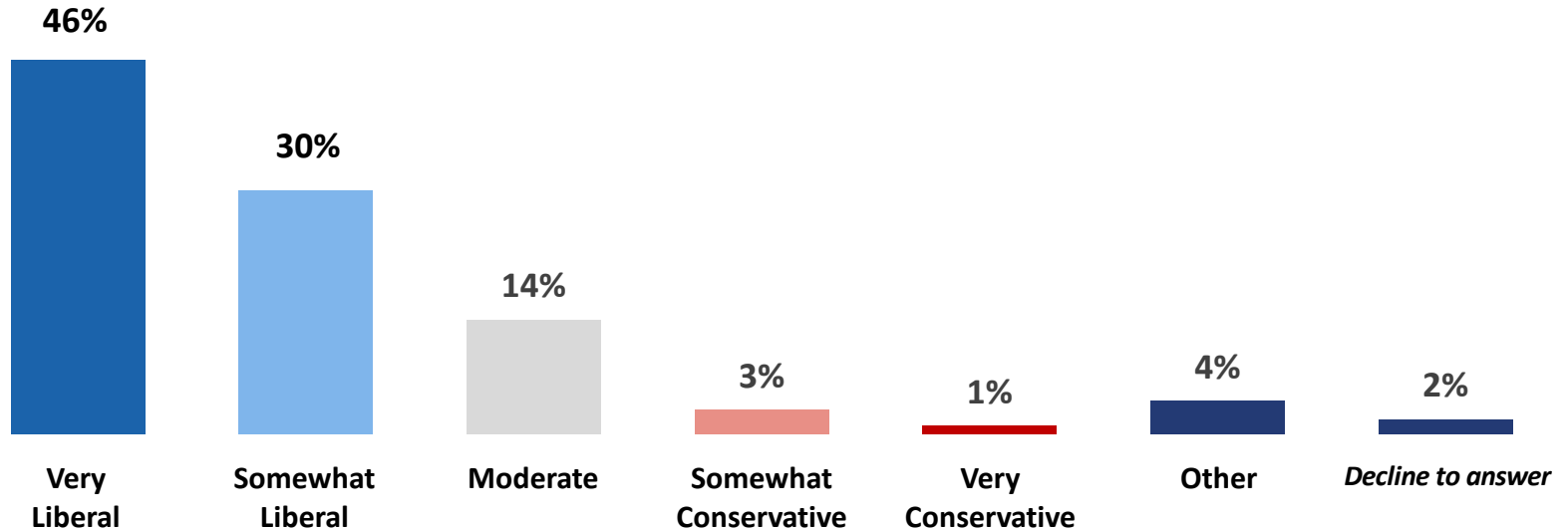


	Better Off Past Year	Better Off Next Year
All LGBTQ	30%	36%
Cisgender Gay & Bi+ Men	30%	36%
Cisgender Lesbian & Bi+ Women	32%	34%
Transgender & Non-Binary Participants	26%	31%
Age 18-34	39%	44%
Age 35-54	33%	39%
Age 55+	21%	24%
Asian / Pacific Islander	30%	34%
Black / African American	34%	48%
Latinx	33%	40%
White (Non-Hispanic)	30%	32%

## Political Tendency

Most of the LGBTQ study participants trend liberal; 46% consider themselves very liberal and 76% are at least somewhat liberal. Very few LGBTQ community members consider themselves to be conservative

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



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## LGBTQ Terminology

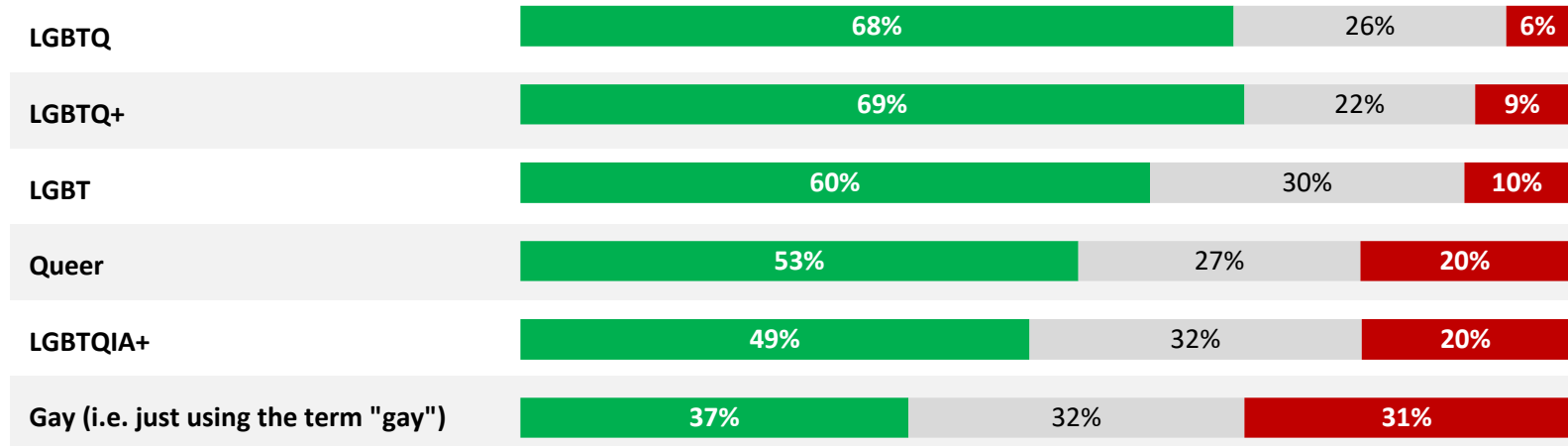


## Terminology Within the LGBTQ Community

“LGBTQ+” and “LGBTQ” are virtually tied as the preferred term to describe the community. LGBTQ or LGBTQ+ may be used by companies and organizations 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). Differences in preferred terminology by demographic can be found on the next page.

**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>	56%	67%	51%	48%	59%	71%
	<i>Neutral</i>	32%	26%	38%	39%	30%	22%
	<i>Unfavorable</i>	12%	7%	12%	13%	10%	6%
<b>LGBTQ</b>	<i>Favorable</i>	69%	66%	66%	66%	66%	71%
	<i>Neutral</i>	24%	26%	30%	29%	27%	22%
	<i>Unfavorable</i>	6%	7%	4%	5%	7%	7%
<b>LGBTQ+</b>	<i>Favorable</i>	73%	63%	72%	76%	68%	63%
	<i>Neutral</i>	19%	24%	23%	17%	22%	26%
	<i>Unfavorable</i>	7%	13%	4%	7%	9%	11%
<b>Queer</b>	<i>Favorable</i>	61%	41%	69%	65%	54%	42%
	<i>Neutral</i>	24%	31%	20%	23%	26%	30%
	<i>Unfavorable</i>	15%	28%	12%	12%	20%	28%

All LGBTQ n=14,262

See methodology for segment bases.

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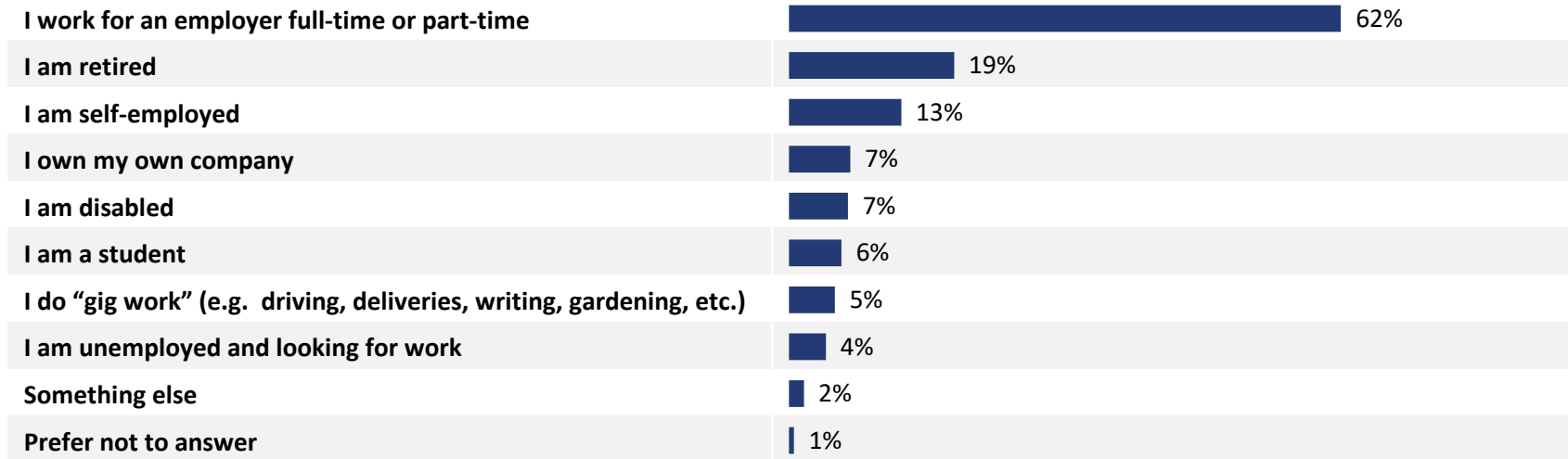
## Work-Life Balance



## Work Life

- 62% of all LGBTQ participants indicated working full-time or part-time for an employer.
- 15% indicated working for themselves for at least part of their income.
- 4% indicated being unemployed and looking for work.
- Among transgender and non-binary participants, who often experience higher levels of workplace discrimination, the unemployment rate was 7%. In addition, a much larger percentage (16%) indicated that they are disabled.

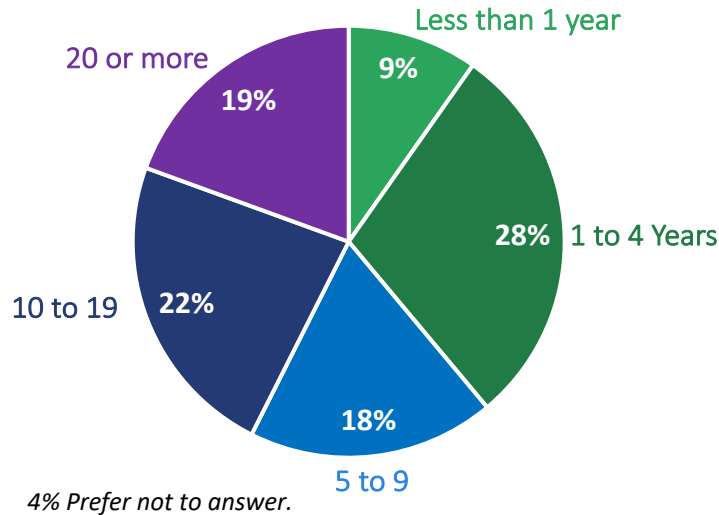
**Q: Please tell us about your work life. Please mark all that apply.**



## Business Owners

**Q: How many years have you owned/operated your own company?**

Among Business Owners



**Q: What motivates you to own your company?**  
Please mark all that apply.

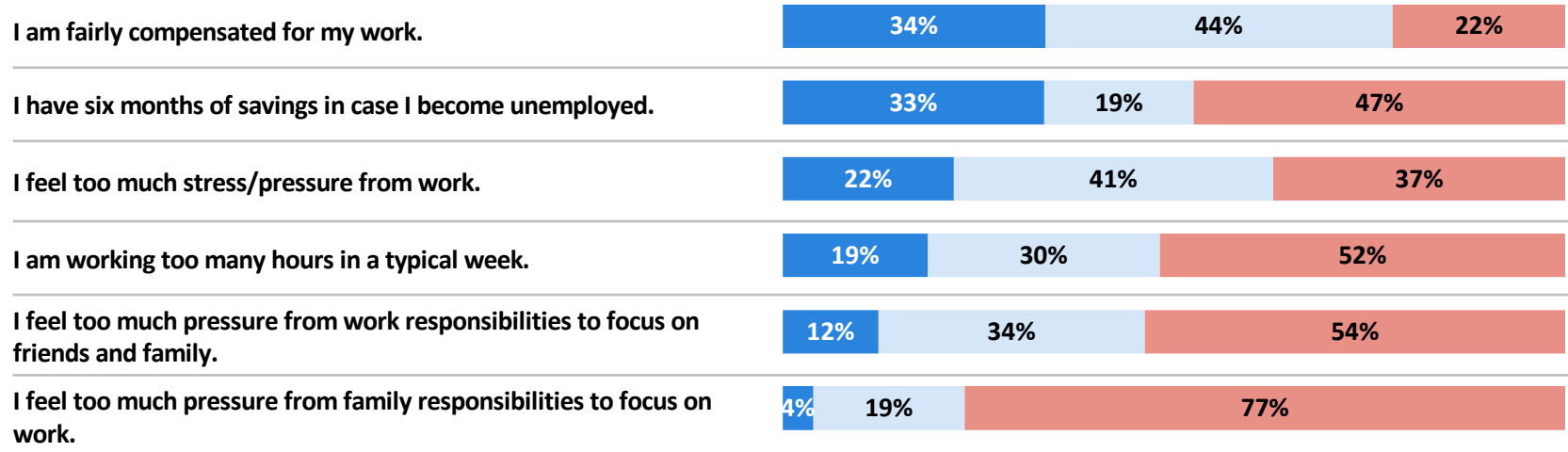
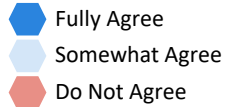
Freedom to make my own business decisions	72%
Better control of live/work balance	65%
I can work from anywhere or work from home	60%
The challenge and rewards of creating something	50%
Sense of pride	48%
Higher income	35%
I faced LGBTQ discrimination when I worked for someone else*	13%
Something else	11%
Prefer not to answer	2%

**28% of transgender/non-binary business owners started working for themselves because they faced discrimination when working for someone else.**

## Work-Life Balance of Employed or Working for Themselves

- 63% feel too much stress/pressure from work
- 48% feel that they are working too many hours in a typical week
- 46% feel too much pressure from work responsibilities to focus on friends and family

### Q: Do you agree or disagree with these statements about work-life balance? Among Employed or Working for Self



## Leisure Activities

Q: Over the past 30 days, have you participated in any of these leisure activities? Please mark all that apply.

	All LGBTQ	Age 18 to 34	Age 35 to 54	Age 55+
Watch television as entertainment	89%	89%	90%	87%
Listening to music as recreation	80%	87%	80%	73%
Dining out as a social activity	74%	78%	74%	71%
Reading as recreation	68%	68%	66%	69%
Outdoor exercise like hiking, cycling, running, swimming, skiing	47%	54%	46%	42%
Play electronic/computer/video games	45%	60%	45%	31%
Shopping as a fun activity	44%	53%	44%	36%
Home cooking or cooking classes as a fun activity	43%	42%	44%	43%
Indoor exercise like gym, classes	38%	43%	38%	32%
Going to bars or nightclubs	34%	50%	36%	20%
Attend live stage entertainment like theatre, dance, comedy	32%	32%	32%	31%
Any form of meditation	31%	32%	32%	29%
Attend live music performances or concerts	30%	33%	28%	28%
Participant in LGBTQ social groups	28%	31%	26%	26%
Volunteer work for non-LGBTQ organizations	16%	14%	14%	19%
Volunteer work for LGBTQ organizations	13%	12%	13%	13%
Active group sports like baseball, basketball, pickleball	9%	13%	8%	6%

All LGBTQ n=14,423

See methodology for segment bases.

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## Corporate Involvement and Outreach



## 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 see lower favorability about corporate involvement in Pride. This sentiment is fueled by younger LGBTQ people, with only 35% of age 18 to 34 agreeing with the Pride statement compared to 77% of age 55 or over. Specifically, for age 18 to 34, 35% agreed with the statement that corporate presence at LGBTQ Pride events is positive for the community; 44% were neutral and 21% disagreed. For younger participants, these percentages are somewhat more positive than 2022.

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

■ Agree
 ■ Neutral
 ■ Disagree

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



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



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



Corporate presence at LGBTQ Pride events is positive for the community






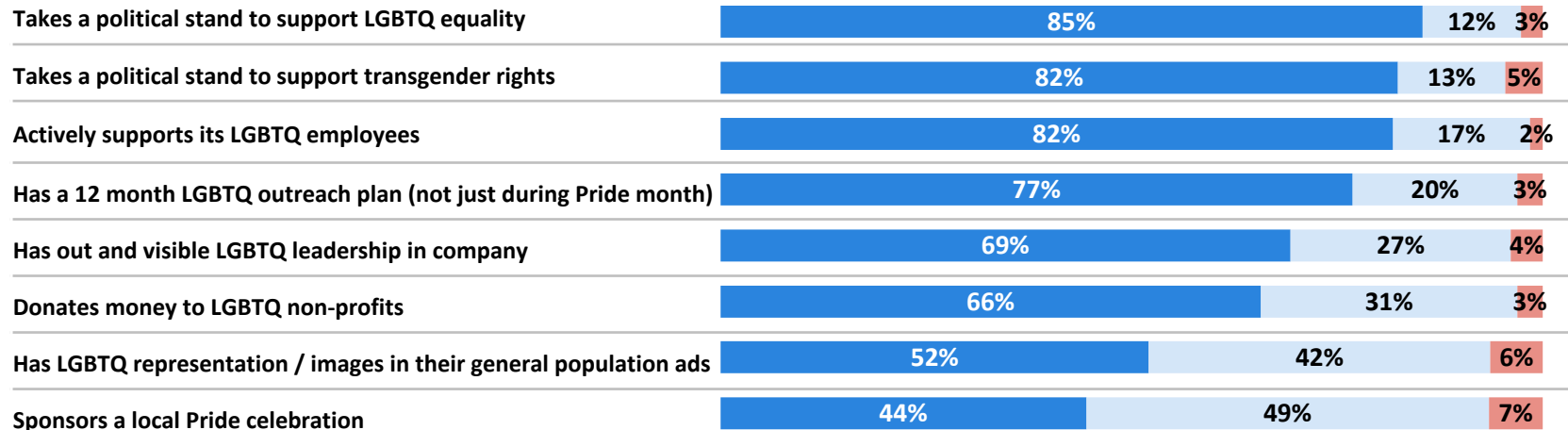


## Perceptions of Supportive Activities

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



## 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%	20%	14%	12%
Stayed the Same	67%	64%	66%	71%
Decreased	11%	9%	12%	11%
Not sure	7%	7%	7%	6%



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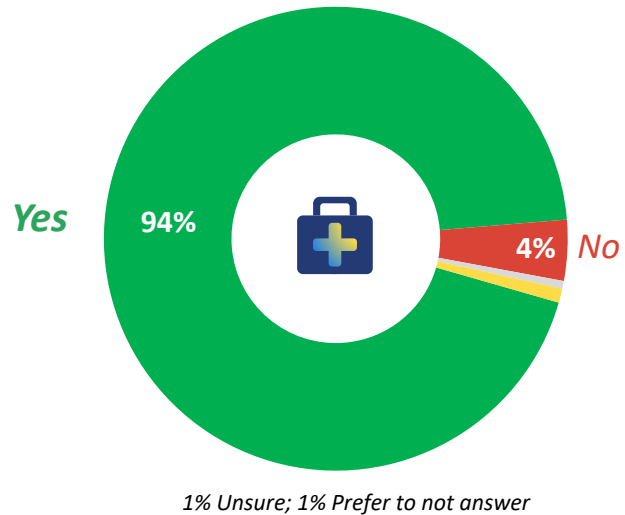
**LGBTQ  
Health**



## Health Insurance

The vast majority of LGBTQ community members have health insurance 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?**



By age, 91% of 18-34 year-olds have coverage, compared to 94% of 35-54 year-olds, and 97% of those 55 or older.

## Health Concerns by Gender Identity

Q: We are going to ask about some health issues. We know this is personal information. Your honest answer will help us understand the health concerns of the LGBTQ community. You may choose “prefer not to answer.”

Of the following medical conditions or concerns, please select the issue(s) that are of greatest concern to you, personally.

Gender Identity Breakout	Red = top concerns		
	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-Binary Participants
Depression, anxiety or other mental health concern	74%	67%	79%
Getting to a healthy body weight	48%	55%	42%
Sleep issues or improving sleep	42%	43%	43%
Preventing or treating cancer (of any type)	41%	48%	36%
Preventing or treating heart disease, stroke or high blood pressure	40%	50%	39%
Preventing or treating COVID-19	40%	38%	44%
Managing chronic pain	38%	28%	42%
Preventing or treating Alzheimer's or dementia	35%	39%	28%
Preventing or treating diabetes	31%	36%	31%
Preventing or treating asthma or respiratory diseases	22%	18%	22%
Reducing or treating substance use (of any type)	22%	30%	25%
Preventing or treating sexually transmitted infections	19%	50%	31%
Preventing or treating HIV	18%	62%	32%
Preventing or treating liver or kidney diseases	16%	24%	17%
Starting, maintaining or access to gender-affirming hormone therapy	13%	12%	54%
Getting gender confirmation surgery	11%	10%	44%
Preventing or treating Mpox	5%	22%	12%
Other medical concern	7%	3%	7%
Prefer not to answer	3%	2%	2%

## Health Concerns by Generation

Q: We are going to ask about some health issues. We know this is personal information. Your honest answer will help us understand the health concerns of the LGBTQ community. You may choose “prefer not to answer.”

Of the following medical conditions or concerns, please select the issue(s) that are of greatest concern to you, personally.

### ► Age Breakout

Red = top concerns

	Age 18 to 34	Age 35 to 54	Age 55+
Depression, anxiety or other mental health concern	80%	73%	62%
Sleep issues or improving sleep	43%	43%	41%
Getting to a healthy body weight	42%	53%	54%
Preventing or treating HIV	38%	36%	43%
Preventing or treating sexually transmitted infections	37%	33%	34%
Preventing or treating COVID-19	36%	35%	47%
Preventing or treating cancer (of any type)	32%	40%	56%
Preventing or treating heart disease, stroke or high blood pressure	28%	42%	61%
Managing chronic pain	26%	32%	43%
Reducing or treating substance use (of any type)	24%	24%	29%
Preventing or treating diabetes	24%	30%	43%
Preventing or treating Alzheimer's or dementia	23%	31%	52%
Starting, maintaining or access to gender-affirming hormone therapy	19%	16%	19%
Getting gender confirmation surgery	16%	13%	14%
Preventing or treating asthma or respiratory diseases	16%	18%	27%
Preventing or treating liver or kidney diseases	13%	17%	28%
Preventing or treating Mpox	13%	12%	15%
Other medical concern	5%	5%	5%
Prefer not to answer	3%	3%	2%

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

USA Report | n= 14,432 | June 2023



**LGBTQ  
Purchasing**



## Alcohol Consumption in the LGBTQ Community

Most (72%) of LGBTQ participants indicated drinking beverages containing alcohol in the past 90 days. The percentages are somewhat higher among gay men (76%) and age 21-34 (80%). Overall, the LGBTQ percentages appear somewhat higher than the general population alcohol consumption statistics.\* There was no significant change in alcohol consumption since the 2022 report.

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

*Among Age 21+ Percentages Indicating “Yes”*



According to the 2019 National Survey on Drug Use and Health (NSDUH), 70% of people ages 18 and older reported that they drank alcohol in the past year and 54% in the past month (National Institute on Alcohol Abuse and Alcoholism).

*Base (Age 21+): All LGBTQ n=14,432*





## Alcohol Consumption in the LGBTQ Community by Gender Identity, Generation and Ethnicity

Compared to 2022, results point to a somewhat weaker consumption of beer (-5%) and wine (-7%) in 2023, while all spirits held steady for consumption. Within the LGBTQ community, vodka is far more likely to be consumed by cisgender gay and bi+ men.

**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. **Among Age 21+ Alcohol Drinkers**



	All LGBTQ	Identity			Age			Ethnicity			
		Cisgender Women	Cisgender Men	TGNB	21-34	35-54	55+	API	Black	Latinx	White
Wine (any type)	62%	61%	65%	53%	63%	58%	64%	60%	55%	61%	63%
Beer (any type)	53%	53%	52%	53%	58%	53%	47%	53%	39%	56%	55%
Vodka	43%	35%	54%	30%	49%	45%	35%	41%	44%	41%	44%
Bourbon or Whiskey	36%	32%	39%	35%	40%	38%	28%	35%	39%	31%	37%
Tequila	32%	31%	35%	23%	44%	31%	21%	27%	38%	42%	29%
Gin	22%	20%	24%	18%	29%	21%	14%	23%	17%	18%	23%
Hard seltzer	21%	20%	24%	17%	38%	20%	6%	25%	16%	20%	23%
Rum	21%	19%	24%	19%	28%	21%	15%	24%	26%	21%	20%
Canned cocktail	13%	12%	14%	12%	23%	12%	4%	13%	14%	14%	13%
Other alcohol drinks	14%	14%	13%	16%	18%	14%	10%	18%	14%	13%	13%
<i>Base</i>	<i>10,353</i>	<i>4,444</i>	<i>4,779</i>	<i>1,129</i>	<i>3,359</i>	<i>3,722</i>	<i>3,271</i>	<i>668</i>	<i>1,300</i>	<i>1,604</i>	<i>6,507</i>

Base (Age 21+): All LGBTQ n=10,353 (that drink alcohol from previous question)

## 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+
\$500+ of new clothing	29%	26%	32%	25%	31%	34%	23%
\$500+ of home furniture	25%	25%	27%	21%	29%	28%	20%
\$500+ of electronics for home or personal use	24%	19%	29%	23%	28%	26%	18%
Purchase or lease a new or used car	15%	13%	17%	14%	14%	16%	14%
\$500+ of skin and beauty products	13%	12%	13%	13%	13%	15%	9%
\$500+ of kitchen appliances	12%	11%	14%	9%	10%	13%	12%
A house, condo or other type of real estate	11%	11%	11%	9%	11%	14%	8%

All LGBTQ n=14,430

See methodology for segment bases.

## 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.

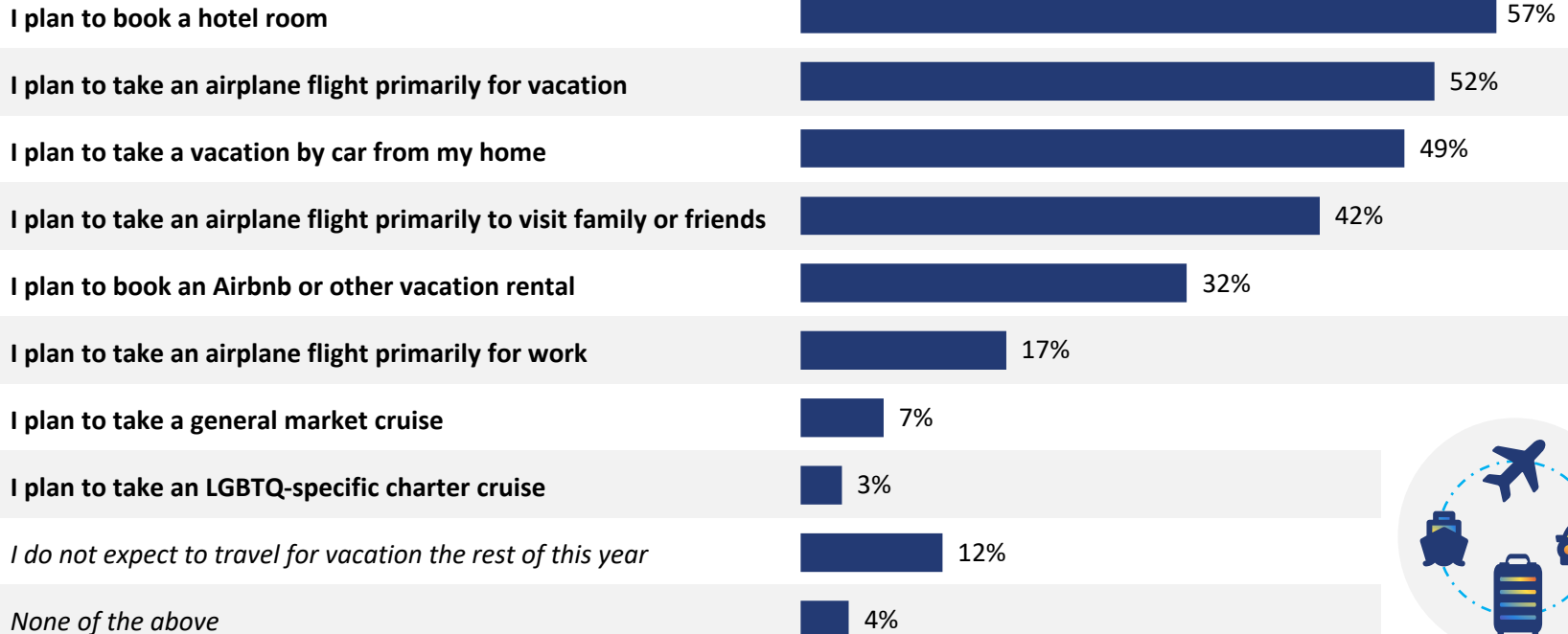
	All LGBTQ	Cisgender Lesbian & Bi+ Women	Cisgender Lesbian & Bi+ Men	Transgender & Non-Binary Participants	Age 18-34	Age 35-54	Age 55+
<b>Streaming television subscription</b> <i>(e.g. Netflix, Amazon Prime, Hulu)</i>	83%	85%	82%	80%	85%	88%	76%
<b>Subscription radio or paid music</b> <i>(e.g. SiriusXM, Pandora, Spotify, Apple Music)</i>	54%	55%	53%	53%	67%	57%	40%
<b>Cable internet</b>	50%	46%	56%	46%	39%	51%	60%
<b>Cable television</b> <i>(basic or with premium channels)</i>	28%	26%	33%	22%	10%	25%	47%
<b>Premium (paid) news service; digital news subscription</b>	23%	25%	22%	17%	24%	24%	21%
<b>Premium (paid) dating app services</b>	8%	3%	13%	5%	9%	9%	5%
<b>Satellite TV</b> <i>(e.g. DIRECTV, Dish, etc.)</i>	6%	6%	7%	5%	3%	5%	11%

All LGBTQ n=14,395

See methodology for segment bases.

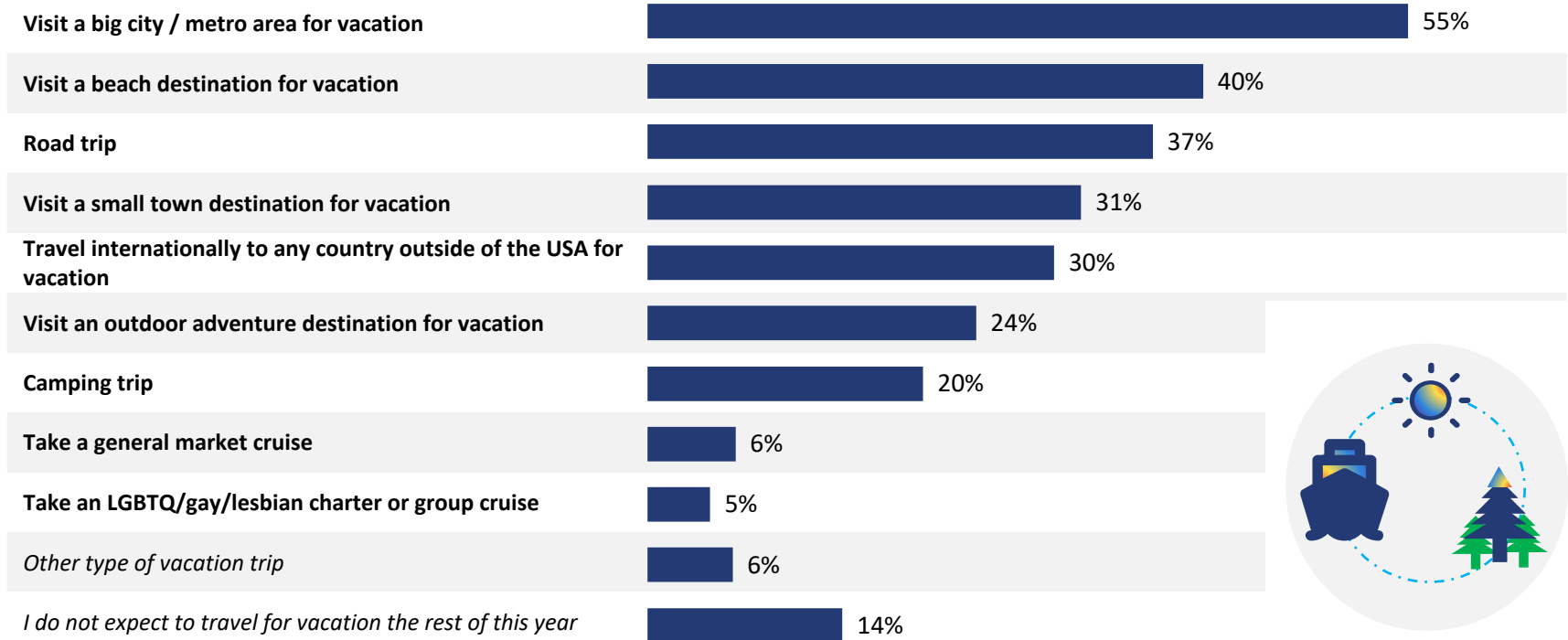
## Travel Plans for the 2<sup>nd</sup> Half of 2023

Q: What are your likely travel plans between now and Dec 31, 2023? Please mark all that apply.



## Types of Destinations for the 2<sup>nd</sup> Half of 2023

Q: For the rest of the year (today to December 31, 2023), to which types of destinations are you likely to travel for vacation (not for business)? Please mark all that apply.

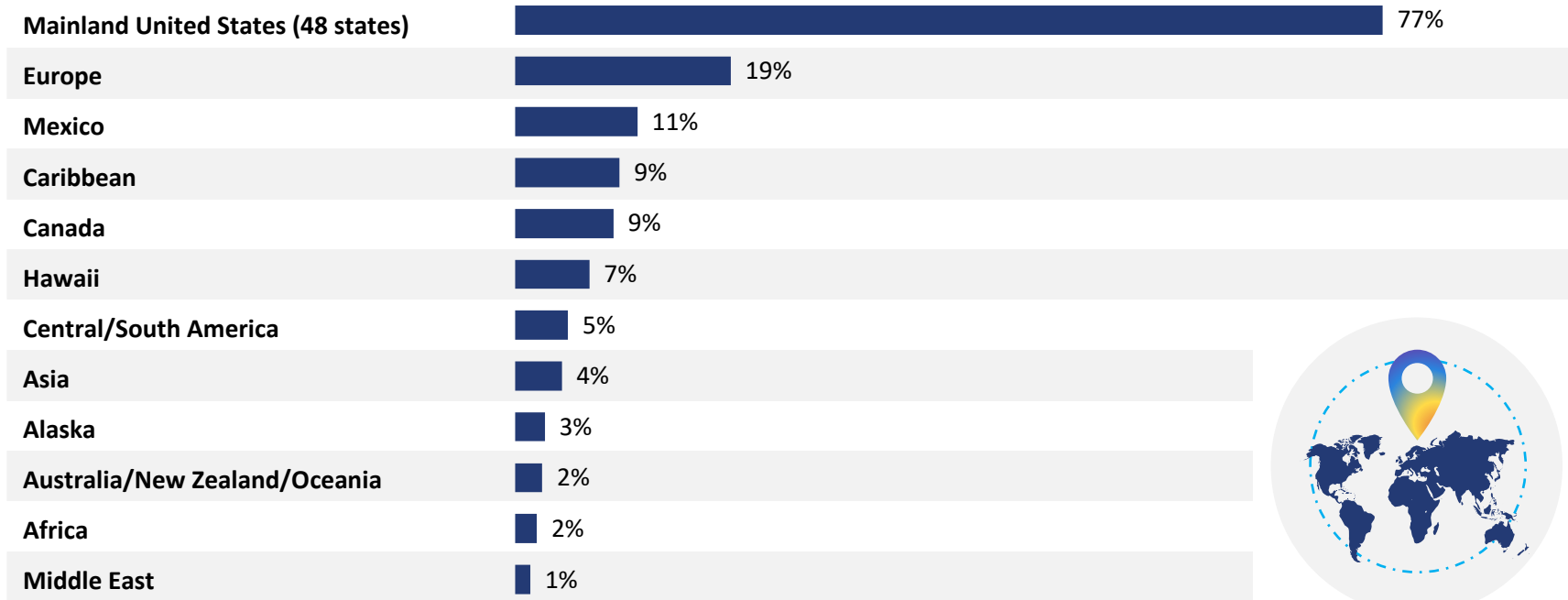


## Destination Priorities for the 2<sup>nd</sup> Half of 2023

Q: For the rest of the year (today to December 31, 2023), 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	18%	39%	17%
Mostly safe and comfortable	36%	39%	32%
Somewhat safe and comfortable	29%	16%	27%
Not safe and comfortable	18%	7%	24%

## 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

LGBTQ, Inc.

3983 S. McCarran Blvd #488

Reno NV 89502 USA

+1 (775) 209-9022

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

*Please contact*

*Thomas Roth, President and Founder [tom@cmi.info](mailto:tom@cmi.info)*

*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 14<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 60+ years of LGBTQ-dedicated experience among the CMI team, we're able to keep your costs within budget. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 25+ years.

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

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

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

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

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



# CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

## LGBTQ Research Panel

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

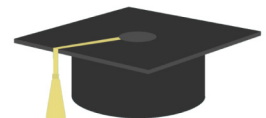
**35%**  
Representing  
LGBTQ  
Communities  
of Color



**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:

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



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Chance E. Mitchell  
Co-Founder & CEO

nglcc   
Certified LGBTBE