



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

LGBTQ Community and Auto Ownership

March 2020



Entire contents © 2020 Community Marketing & Insights
Reproduction or distribution by permission only.



ABOUT CMI: 25+ YEARS OF LGBTQ INSIGHTS

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

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

RESEARCH DESIGN

25+ YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has built a proprietary research panel of nearly 50,000 LGBTQ consumers through partnerships with more than 300 LGBTQ publications, websites, blogs, social media, apps, events, and organizations since 1992. Importantly, the panel reflects the readership/membership of a broad range of LGBTQ-focused media outlets, organizations, and events. This means that the results summarized here are representative of LGBTQ consumers who are “out” and interacting within the LGBTQ community.

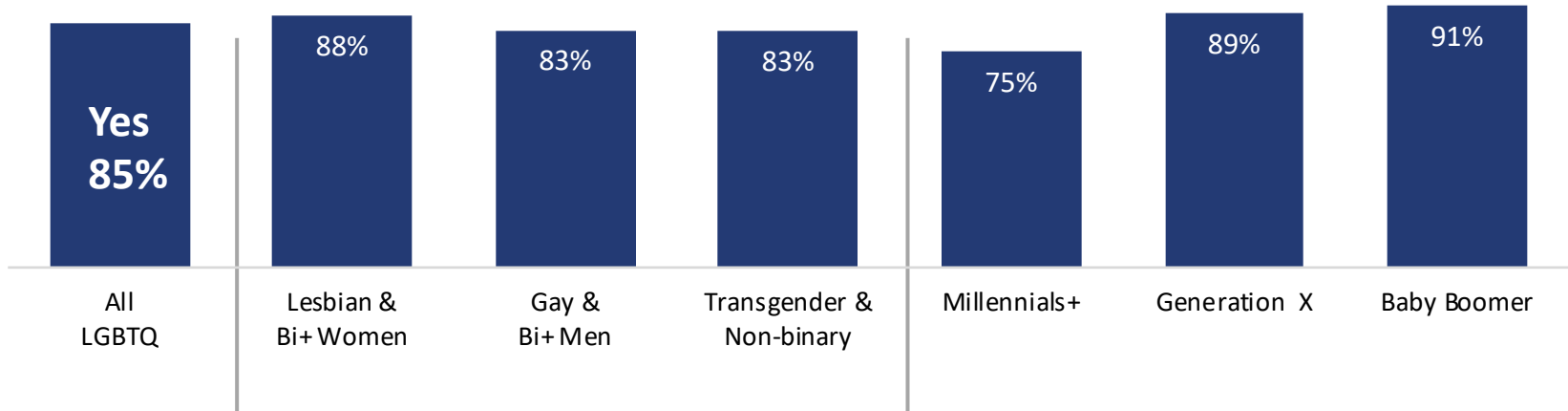
- › 4-minute online survey conducted in February 2020.
 - › This report focuses on the data of 3,811 self-identified members of the LGBTQ community living in the United States, including 1,730 gay and bi+ cisgender men, 1,640 lesbian and bi+ cisgender women and 441 transgender and non-binary community members.
 - › Participants were age 18 to 74. By generation, 1,567 of participants were Millennials+ (includes Gen Z age 18 or over), 1,020 Generation X, and 1,224 Baby Boomers.
 - › Participation was from all 50 states.
 - › As an incentive, respondents were entered into a drawing for one of five \$100 gift card prizes in recognition of their time to participate in the study.
- › **Weighting:** In order to balance the opinion by gender and generation, all LGBTQ weighted results were calculated with the following assumptions; Millennials+ (1981-2002) 33%, Generation X (1965-1980) 33%, Baby Boomer (1946-1964) 33%; gay and bisexual men 46%, lesbian and bisexual women 46%, and gender-expansive (transgender, trans woman, trans man, non-binary gender identity, genderqueer, and gender fluid) 8%.
 - › In this report, some percentages may not add up to 100% due to rounding or multiple selections allowed.
 - › The survey has a margin of error of $\pm 2.77\%$ at a 95% level of confidence.

LGBTQ Car Ownership Rates: Car ownership in the LGBTQ community tends to be similar to the USA general population*. How car ownership questions are asked can change results slightly, but most LGBTQ and general population studies tend to range from 82% to 88% for car ownership (CMI research in the past three years puts the range from 82% to 85% for LGBTQ). There is some thought that LGBTQ people may be slightly less likely to own cars because they are more likely to live in urban areas, which may also be one of the reasons that gay and bi+ men tend to be somewhat less likely to own cars than lesbians and bi+ women. However, any impact from these environmental factors seems minor. Overall, the vast majority of LGBTQ people in the United States own cars. Millennials underperform older generations in car ownership. 95% of participants had a driver's license.



Do you currently own or lease a car?

(If you live with a partner/spouse, please respond yes if you own your car and/or jointly own a car together).



*For example, in 2015 Pew Research indicated that 88% of American households own a car; the 2019 Statista Global Consumer Survey indicated 83% of participants own a car.

Base: All LGBTQ n= 3,811; Gay & Bi+ Men n= 1,730; Lesbian & Bi+ Women n= 1,640; Transgender & Non-binary participants n= 441; Millennial+ n= 1,567; Gen X n= 1,020; Boomer+ n= 1,224.

Why Some LGBTQ Community Members Do Not Own a Car: The main reason that 15% of LGBTQ community members do not own a car appears to be that they live in areas where a car is not needed. However, financial reasons are also a major concern. Of those without a car, over half would consider a car. Of those without a car, Baby Boomers are most likely to remain car-free (43% very committed), and most of them live in cities with good transportation. Only 23% of Millennials without a car said that they are very committed to remaining car-free.

Why do you not have a car? (Please mark all of your primary reasons.)



How committed are you to remaining car-free?

I use my area's public transportation	67%
In my area, I can walk to places I need to go	53%
I live in an area where owning a car is difficult	45%
I can not afford a car / financial reasons	41%
Not owning a car is more environmentally-friendly	33%
I previously had a car, but my driving needs have changed	25%
I do not have a driver's license	22%
I use a bike as transportation	15%
Owning a car is not common among my friends	13%
I am younger, but will probably buy a car later in life	9%
I use a motorcycle as transportation	1%
Other reason than above	13%

I am very committed to remaining car-free	28%
I am somewhat committed to remaining car-free	17%
I would like to have a car if my life situation changes (like income, where I live, etc.)	41%
I'm not sure. Sometimes I want to remain car-free; sometimes I want to buy a car	14%

Base: Participants without a car, All LGBTQ n=616.

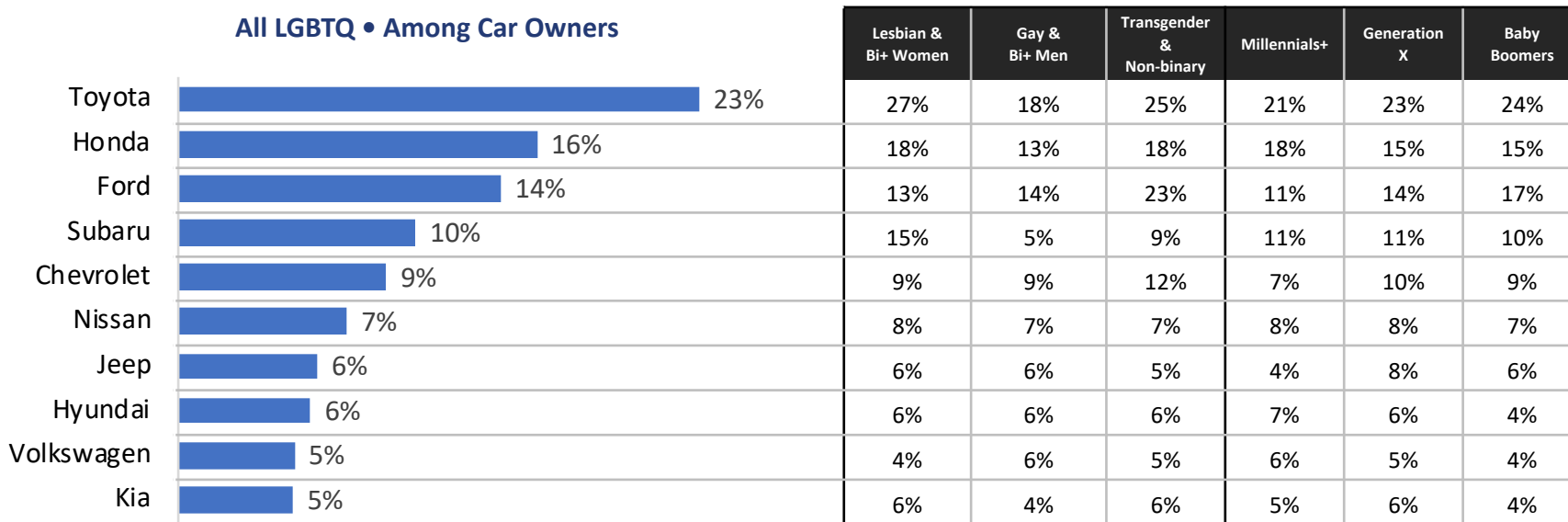
Brands Owned: This question asks about cars owned in LGBTQ households regardless of the age of the car. Toyota, Honda, Ford, and Subaru (especially for women) are the top brands owned within the LGBTQ-community.

Which brand(s) of cars do you own or lease?

Please mark for you, or for you and your partner/spouse.



All LGBTQ • Among Car Owners

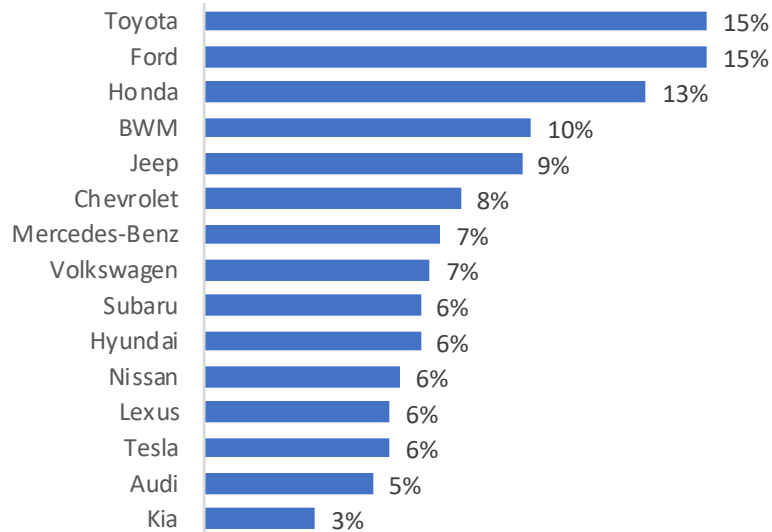


Other Brands Tested: BMW, Dodge (4%); Mercedes-Benz (3%); Lexus, Volvo, Chrysler, Audi (2%); Buick, Acura, Tesla, Cadillac, Infiniti, Lincoln, Mitsubishi, Jaguar, Porsche, Genesis (1% or less).

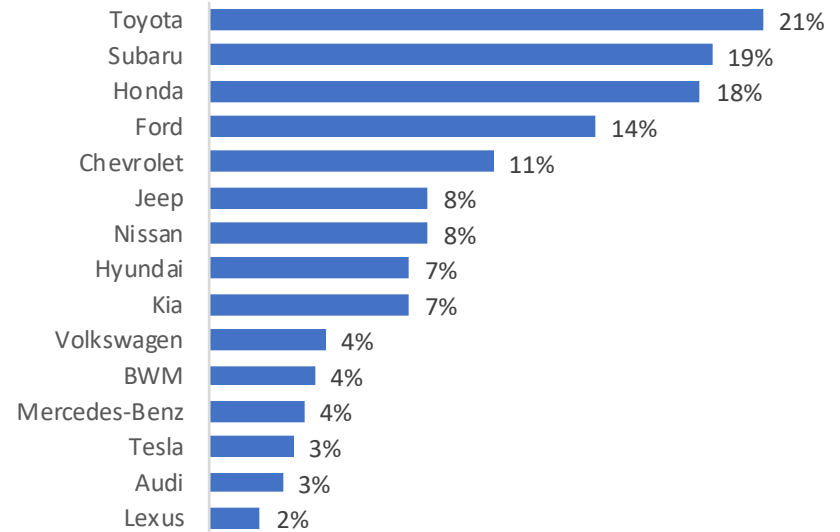
Base: Those who own or lease a car, All LGBTQ n=3,190.

Brands Owned by Recent LGBTQ Car Purchasers: Viewing the data in a different way, we looked at the top brands in households where either the participant or their partner purchased or leased a new car in the past two years. This data may also include some older cars in the household. The overall number of participants is smaller for these charts (men n=329, women n=259), so the findings are more directional. Two trends emerge: Luxury brands are far more likely to be purchased by gay and bi+ men. Subaru is far more likely to be purchased by lesbian and bi+ women.

Gay & Bi+ Men



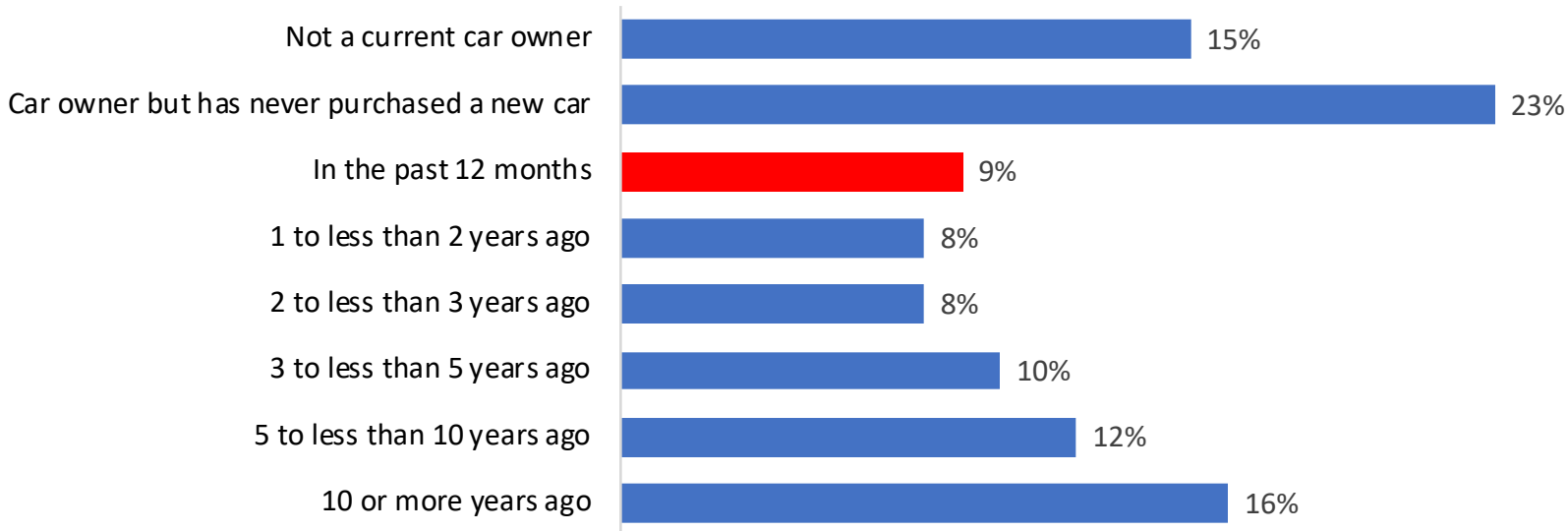
Lesbian & Bi+ Women



Question: Which brand(s) of cars do you own or lease? (Please mark for you, or for you and your partner/spouse).

Base: Purchased a car in the past 2 years, Unweighted Gay & Bi+ Men n=329, Lesbian & Bi+ Women n=258

New Car Purchases: 9% of participants purchased or leased a new car in the past year and 25% in the past three years. By gender, gay and bi+ men were most likely to have purchased or leased a new car in the past year (11%). Generation X was the age group most likely to purchase or lease a new car in the past year (11%).



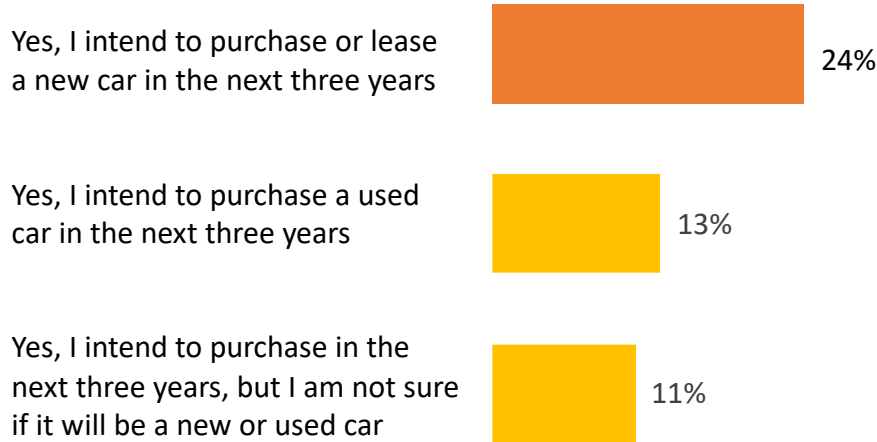
Three questions to determine chart: Do you currently own or lease a car?
Have you ever purchased or leased a new car (not a used car)?
When is the last time that you purchased or leased a new car (not used)?



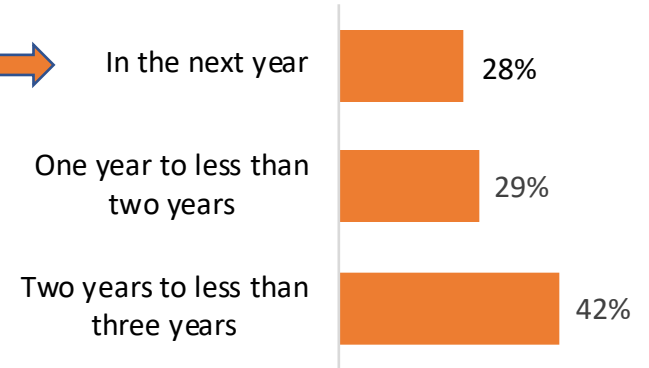
Base: All LGBTQ n= 3,811

Future Car Purchases: 47% of all LGBTQ participants intend to buy a car in the next three years: 24% intend to purchase or lease a new car, 13% a used car, and 11% are not sure if the purchase will be new or used. Of all participants, 8.5% said they intend to purchase a new car in the next 12 months, which is consistent with the 9% who said that they purchased in the past 12 months.

Do you intend to purchase or lease a new or used car in the next three years?
Of all participants

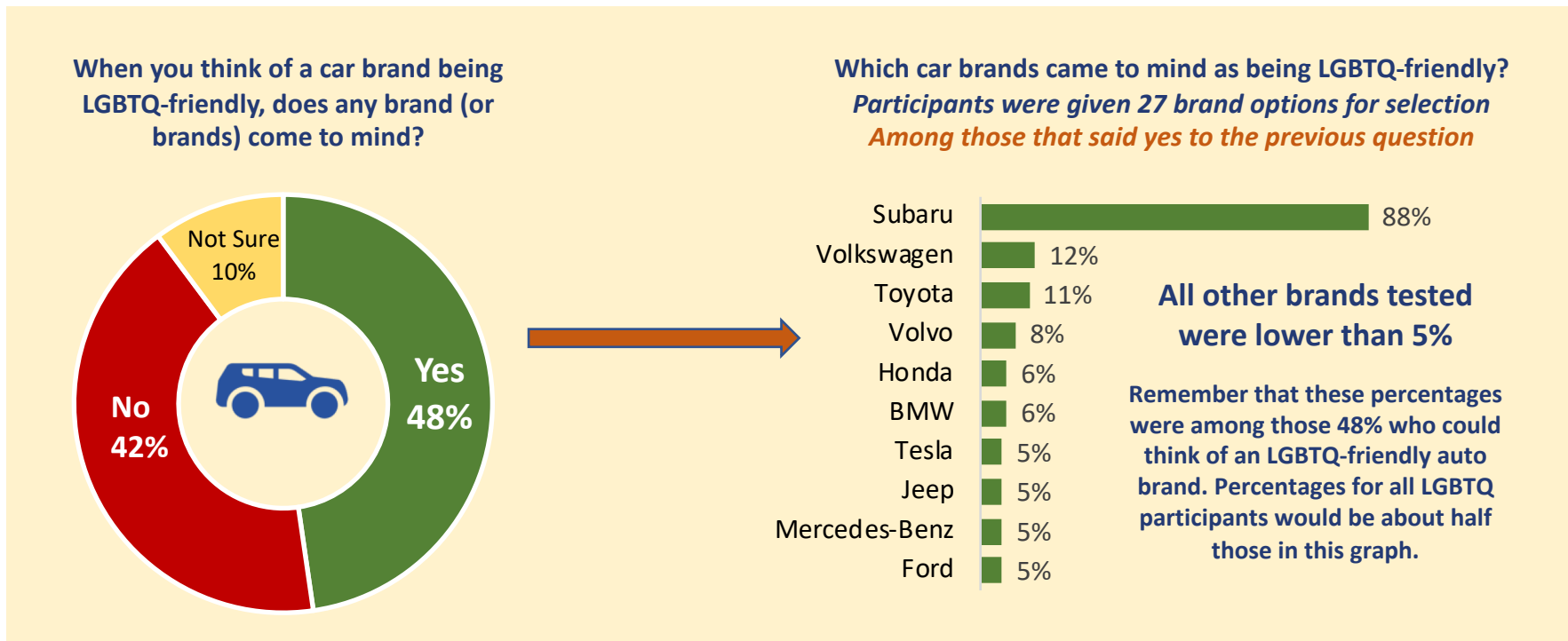


When do you think you will purchase or lease your next new car?
Of those intending to purchase a new car



Base: All LGBTQ n=3,811; Among those wanting to but a new car in next three years n=864

LGBTQ-Friendly Auto Brands: About half of LGBTQ participants (48%) were able to think of an auto brand that they consider to be LGBTQ-friendly. However, only Subaru registered significant brand recognition among the LGBTQ community.



Base: All LGBTQ (cars owners and non-car owners) n=3,811;
 Those indicating that they could think of an LGBTQ-friendly car brand n=1,810

Motivations to Purchase a New Car: While there are some specific gender and generation differences as to why LGBTQ people purchase a new car vs. a used car, the overall rankings are similar.

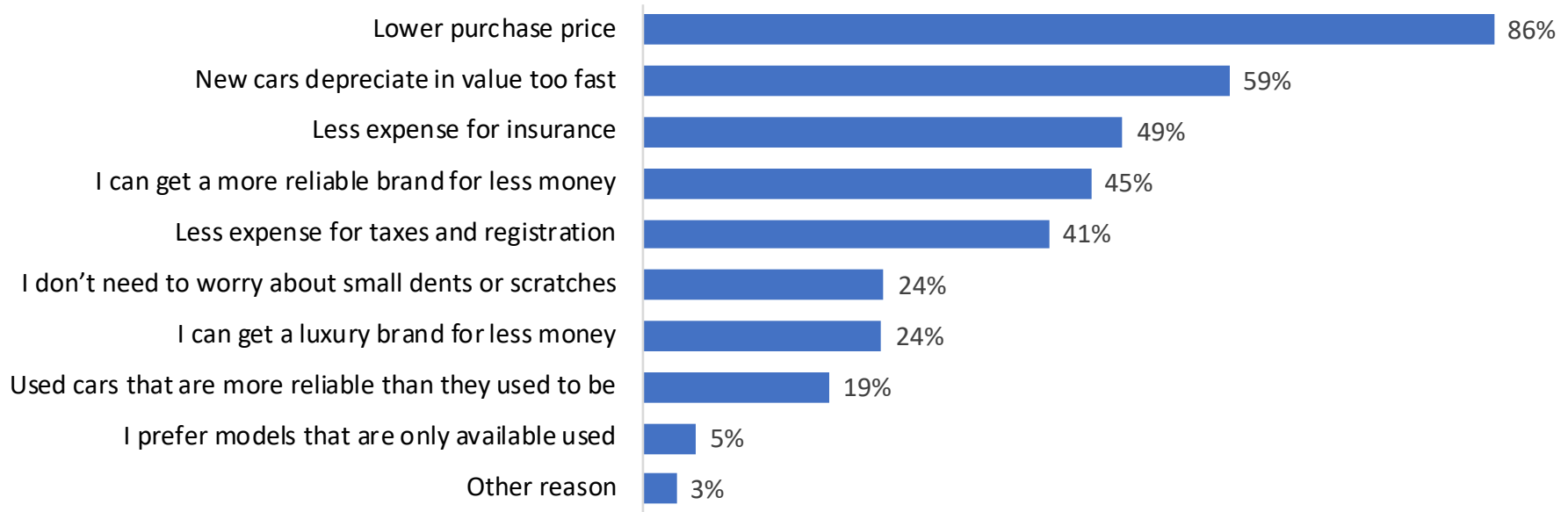
What are your primary reasons for preferring a new car vs. a used car? (Please mark all that apply.)
Among those intending or considering the purchase a new car

	All LGBTQ	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary	Millennials +	Generation X	Baby Boomers
Less worry about maintenance	70%	70%	70%	63%	68%	72%	68%
I like the newer technology (interface, voice controls, etc.)	56%	53%	61%	41%	62%	57%	52%
I like the newer safety features (stop-assist, lane drift correction, etc.)	56%	55%	58%	51%	60%	56%	54%
Improved gas mileage	44%	48%	42%	39%	56%	41%	39%
Chance to buy an electric or hybrid vehicle	33%	34%	32%	39%	39%	31%	32%
Like the style of new models	26%	19%	31%	23%	32%	27%	19%
Great financing / incentives available today	24%	26%	23%	18%	25%	27%	19%
That crisp new car look	19%	15%	23%	13%	23%	20%	15%
I do not trust used cars	17%	17%	16%	18%	14%	19%	16%
That new car smell	13%	9%	16%	9%	14%	15%	10%
Status of the new car	10%	7%	14%	4%	15%	10%	6%
Other reason	6%	7%	5%	1%	7%	5%	6%

Base: Intending or considering the purchase a new car n=1,259

Motivations to Purchase a Used Car: Those considering a used car are primarily motivated by financial concerns.

What are your primary reasons for preferring a used car vs. a new car? (Please mark all that apply.)
Among those intending or considering the purchase a used car



Base: Among those intending or considering the purchase a used car n=888

Type of Car Considered: Sport utility vehicles and hybrid/electric cars are the most popular types of cars considered. Strong gender differences exist for interest in luxury cars. Strong generation differences exist for interest in hybrid/electric cars.

What type of car are you likely to purchase or lease (new or used)? Please mark any that you would seriously consider.
Among those considering the purchase of a new or used car

	All LGBTQ	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary	Millennials +	Generation X	Baby Boomers
SUV (sport utility vehicle)	52%	53%	52%	45%	49%	55%	51%
Hybrid/electric of any car type	43%	46%	40%	38%	52%	41%	36%
Sedan	33%	32%	34%	33%	44%	31%	25%
Cross-over	29%	31%	27%	26%	32%	30%	25%
Wagon or hatchback	22%	28%	16%	28%	28%	25%	13%
Luxury car	16%	9%	23%	11%	15%	15%	18%
Pick-up truck	15%	16%	15%	15%	17%	16%	13%
Coupe	12%	10%	14%	10%	12%	13%	10%
Sportscar	9%	7%	11%	4%	9%	9%	8%
Van or minivan	5%	6%	3%	17%	5%	6%	5%
Other type of car	3%	2%	3%	4%	4%	1%	3%

Base: Considering the purchase a new or used car n=1,754

Motivations to Purchase a Car

What are your primary considerations when purchasing or leasing a new or used car?



Among those considering the purchase of a new or used car	All LGBTQ	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary	Millennials +	Generation X	Baby Boomers
Reliability reputation of car / brand	66%	67%	65%	69%	62%	66%	69%
Low gas mileage / fuel efficiency	59%	68%	51%	56%	71%	59%	48%
Value price for type of car	52%	56%	48%	60%	58%	52%	47%
Known to be a safe car	50%	61%	41%	42%	53%	49%	49%
Ride and handling of car	49%	50%	50%	41%	45%	49%	54%
Has the latest technology	36%	28%	46%	20%	37%	35%	37%
Exterior style	32%	24%	40%	27%	29%	33%	34%
4-wheel-drive / all-wheel-drive	32%	34%	30%	34%	34%	33%	28%
Roomy indoors	30%	31%	30%	29%	30%	31%	29%
Low price	29%	31%	27%	41%	44%	27%	19%
Electric or hybrid car	28%	28%	29%	27%	34%	25%	26%
Car brand is LGBTQ friendly	25%	28%	23%	31%	25%	26%	25%
Loyal to certain type of car / brand	20%	19%	22%	15%	18%	20%	23%
Good car for my pets	16%	20%	13%	15%	15%	17%	16%
Outdoor adventure oriented car	13%	16%	8%	18%	17%	12%	9%
Good car for children	9%	15%	3%	18%	13%	12%	1%
Other reason	5%	4%	5%	9%	3%	5%	6%

Base: Considering the purchase a new or used car n=1,754

FOR MORE INFORMATION:

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

Entire contents © 2020 Community Marketing & Insights
Reproduction or distribution by permission only.

Let us help you better understand your opportunities, grow your LGBTQ market share, and improve return on investment.



Community Marketing & Insights

LGBTQ, Inc.

145 Corte Madera Town Center #202

Corte Madera CA 94925 USA

Voicemail/Fax +1 (415) 343-4656

www.CMI.info @LGBTQInsights



CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

LGBTQ Research Panel 2020

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

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



44,000
LGBTQ Panelists
in the USA



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

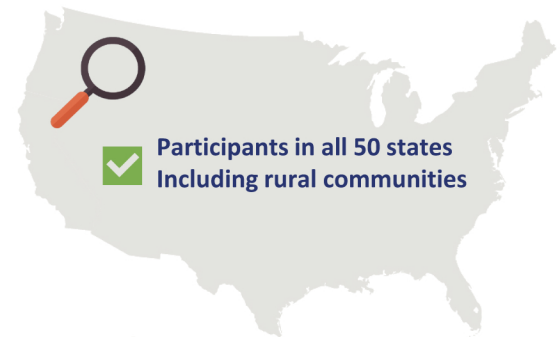


IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBTQ SEGMENT

15,000
Lesbian and
Bi+ Women



24,000
Gay and
Bi+ Men



Participants in all 50 states
Including rural communities

5,000
Transgender
and Non-binary
Community
Members



7,000
Bisexual and
Pansexual
Community
Members



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



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

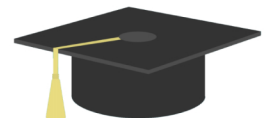
35%
Representing
LGBTQ
Communities
of Color



33%
Under Age
35



50%
With a BA or
Higher



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



20%
Legally Married



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



FOR MORE INFORMATION ON CMI'S LGBTQ RESEARCH CAPABILITIES, PLEASE VISIT WWW.CMI.INFO
CONTACT THOMAS ROTH at tom@cmi.info or call +1 (415) 343-4656

LGBTQ Market Research:

There is a difference!

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

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

CMI'S PROPRIETARY PANEL

Community Marketing & Insights (CMI) has recruited for our proprietary research panel over the past 25 years by partnering with over 300 LGBTQ media, organizations, events, social media and influencers throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is highly representative of LGBTQ consumers who interact with LGBTQ community organizations and media. Our panelists come from diverse sources, allowing for broad LGBTQ research projects or targeted segments within LGBTQ.

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

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

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

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

CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS

CMI has conducted hundreds of LGBTQ-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market. Size does matter when it comes to surveys. Our panel has grown to 50,000 qualified and active LGBTQ consumers—the largest of its kind, by far. Our Annual LGBTQ Community Survey® study (now in our 14th year) has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

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

GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH

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

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

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

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

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

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

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

VALUE FOR THE INVESTMENT

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

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

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

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