



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

COVID-19 and LGBTQ Travel in 2020

Initial Study: May 2020

Follow-up: October 2020

Members:



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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 and China. Industry leaders 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 is an LGBTQ Travel Industry Research Leader. In the past few years, we have produced studies for these and many other clients: Las Vegas CVA, Greater Fort Lauderdale CVB, NYC & Company, VisitBritain, Argentina Tourism Office, Hawaii Tourism Authority, Visit Florida, Greater Miami Convention & Visitor's Bureau, Tourism Toronto, Tourisme Montréal, West Hollywood Travel + Tourism Board, Travel Portland, Visit Raleigh, Discover Puerto Rico, Visit Salt Lake, W Hotels, Kimpton Hotels, and Hawaiian Airlines. CMI clients also span many other industries including Wells Fargo Bank, AT&T, Aetna, UPS, Google, Target, Hallmark, DirecTV, Johnson & Johnson, WNBA, AARP, Kaiser Family Foundation, Freddie Mac, U.S. Census Bureau and numerous other corporations, organizations, universities, and government institutions across North America and around the world.



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

About the Research

RESEARCH DESIGN

25+ YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has built a proprietary research panel of nearly 50,000 LGBTQ consumers across North America 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 a broad spectrum of LGBTQ consumers who are “out” and interacting within the LGBTQ community.

- › 8-minute online initial survey conducted May 14-19, 2020. The May 2020 survey attracted 1,864 self-identified members of the LGBTQ community living in the United States.
 - › 5-minute online follow-up survey conducted October 24-30, 2020. The October survey was sent to the same group that completed the May survey, and 1,342 (72%) responded to the follow-up research.
 - › The demographic profile between the two groups was consistent (see next slide).
 - › Participation was from all 50 states and Washington, DC.
 - › As an incentive, respondents entered into a drawing for one of five \$100 gift card prizes in recognition of their time to participate in the study.
- › **Weighting:** To balance the opinion by gender and generation, all LGBTQ weighted results were calculated with the following assumptions: Millennials+ (1981-2000) 33%, Generation X (1965-1980) 33%, Baby Boomer (1950-1964) 33%; gay and bi+ men 46%, lesbian and bi+ 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.

UNWEIGHTED PARTICIPANT PROFILE

Gender Identity	May 2020	Oct 2020
Cisgender Men	48%	48%
Cisgender Women	43%	42%
Transgender and Non-binary Identities*	9%	10%

*Transgender, trans woman, trans man, non-binary, genderqueer, agender, and gender fluid

Household Income	May 2020	Oct 2020
Under \$49,999	29%	29%
\$50,000 to \$99,999	34%	36%
\$100,000 or more	31%	32%
Prefer not to answer / not sure	6%	3%

Relationship Status	May 2020	Oct 2020
Single	46%	47%
Living with Partner	15%	16%
Married or Civil Union	36%	35%
Other	3%	2%

Generation	May 2020	Oct 2020
Millennial+ (1981-2000)	38%	39%
Generation X (1965-1980)	32%	32%
Baby Boomer+ (1950-1964)	30%	29%

Ethnicity / Race*	May 2020	Oct 2020
Asian, Asian American or of Asian descent + Pacific Islander	5%	5%
Black, African American or of African descent	10%	10%
Latino, Latina, Latinx or Hispanic	12%	11%
Native North American, American Indian, or Alaska Native	2%	2%
White or Caucasian (Non-Hispanic)	70%	71%
Mixed ethnicity or race	6%	6%
Prefer not to answer	1%	1%

*Multiple selections allowed

Participants were represented from all 50 states and DC. Participant were ±1% by state comparing the two time periods



Executive Summary

EXECUTIVE SUMMARY

- Readers should understand the time-period context of the survey. In late October 2020, media reports emphasized that Europe was experiencing a significant increase in the number of COVID-19 cases, and many countries were discussing new lockdowns. In the United States, over 30 states were experiencing case spikes. Also, the survey was fielded a week before the U.S. General Election. LGBTQ community members tend to be liberal, and in the United States, political affiliation often influences personal response to COVID-19.
- **Financial Impact:** The pandemic is not financially impacting all LGBTQ people equally. About half of the participants reported a negative economic impact.
- **Strong Desire to Travel:** 75% of all LGBTQ participants indicated an extreme or moderate desire to travel again for vacation. That desire to travel is strong across age and gender demographics.
- **Half the LGBTQ Community is Traveling:** 46% of the LGBTQ participants indicated taking at least one overnight vacation between May 1 to October 30, 2020.
- **Car Travel is Popular:** Overnight car vacations are currently far more popular than vacations requiring flights. Of those taking vacation trips, 86% took at least one vacation trip by car, compared to 27% taking an airplane trip. Among LGBTQ participants planning to take a vacation in the next six months, most are leaning towards car vacations, not airplane trips.
- **Types of Destinations:** The pandemic is especially hurting trips to big cities (only 14% of participants took a trip to a big city during the past six months) and international trips (1%). However, trips to small towns and outdoor destinations are doing fine, and visitation rates are comparable to CMI data for 2019.

EXECUTIVE SUMMARY

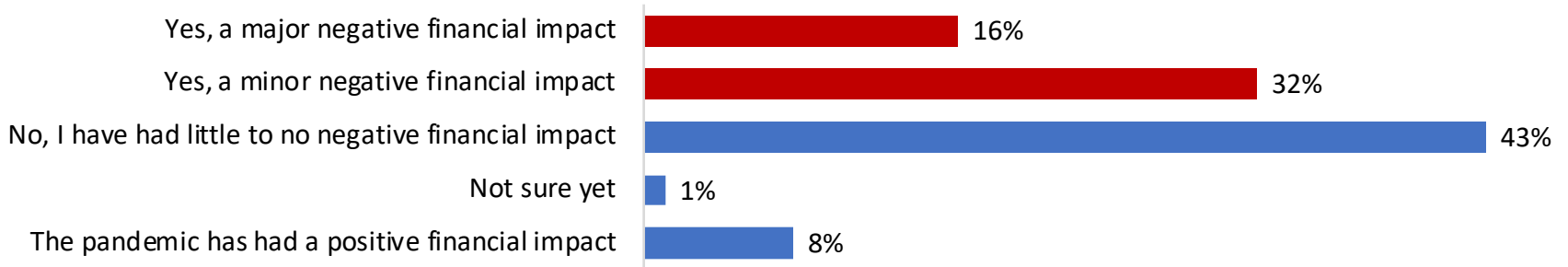
- **Activities While Traveling on Vacation:** For the near future, LGBTQ travelers feel most safe and comfortable participating in activities in outdoor spaces and without crowds. These types of activities are available in all destinations, including big cities. Compared to the May study, the comfort level for outdoor activities during trips has increased, while the comfort level for indoor activities has remained consistently low.
- **Future Travel:** Most LGBTQ participants (63%) hope to take a trip over the next six months. However, few have made any arrangements to date. Among those considering a trip, only 30% have planned the vacation.
- **Demographic Differences:** Cisgender gay/bi+ men and lesbian/bi+ women are about equal in their intention to take a vacation trip in the next six months. There are significant generational differences, with younger participants being more likely to plan a trip.
- **Air Travel Weakness Through 2021:** Only 37% of all participants are willing to take a plane vacation through the end of 2021. Cisgender gay/bi+ men were the most likely to indicate a vacation by plane at 45%, much higher than cisgender lesbian/bi+ women and transgender/non-Binary participants. The variation by generation was within 5%, with Generation X being most likely to fly (40%).
- **Travel Safety:** Only 19% of LGBTQ community members feel very/mostly safe flying right now (45% indicated at least somewhat safe). Only 38% of LGBTQ community members feel very/mostly safe staying in a hotel (76% indicated at least somewhat safe). Most participants want airlines and hotels to develop and enforce strict precautions to improve safety.



Results

Financial Impact: COVID-19 has financially impacted the LGBTQ community. In October 2020, 48% of LGBTQ participants indicated that COVID-19 had a negative financial impact on their lives. This overall percentage is consistent with the May 2020 results. Note that the transgender community has been economically impacted more than cisgender men and women.

October 2020
Has the COVID-19 pandemic had a financial impact on you, to date?
All LGBTQ Participants



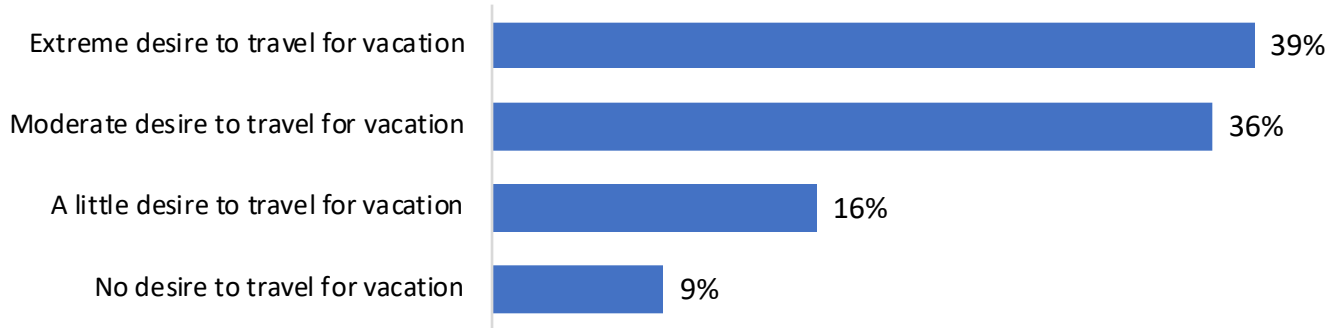
**Major or Minor
 Negative
 Financial Impact
 October 2020**

All LGBTQ Participants	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers+
48%	46%	47%	56%	45%	52%	46%

Base: All LGBTQ participants n= 1,342.

Desire to Travel Again: 75% of all LGBTQ participants indicated an extreme or moderate desire to travel again for vacation. That percentage has increased 6% since May 2020. Increases were seen across all demographics. Only 9% indicated that they had no current desire to travel for vacation.

October 2020
How “pent-up” is your desire to travel for a vacation?



	All LGBTQ Participants	Cisgender Lesbian & Bi+ Women	Cisgender Gay & Bi+ Men	Transgender & Non-binary Participants	Millennials+	Generation X	Baby Boomers+
Extreme Desire to Travel	39%	38%	42%	24%	41%	40%	34%
Extreme or Moderate Desire to Travel	75%	76%	77%	62%	77%	74%	72%

Base: All LGBTQ participants n= 1,342.

LGBTQ Travel This Past Summer: 46% of the LGBTQ participants indicated taking at least one overnight vacation during the May-October period. Participants were far more likely to travel by car for a vacation than by air. The pandemic has especially hurt summer trips to big cities (only 14% of participants) and international trips (1%). Gay men are more likely to be urban travelers, and their percentages were slightly higher, with 17% having taken an urban trip.

**During the past 6 months (May 1 to present), which types of vacation trips did you take, and spent at least one overnight?
Please mark all that apply.**

Asked of All LGBTQ Participants	
A big city / metro area for vacation	13%
A small town destination for vacation	21%
A beach destination for vacation	14%
An outdoor adventure destination for vacation	13%
Internationally or to any country outside of the USA	1%
Other type of trip than listed	8%
I took no overnight trips for vacation	54%

For the Period May 1 to October 30, 2020

- Of all participants, 12% took at least one vacation trip by airplane
- Of those taking at least one trip, 27% took at least one vacation trip by airplane
- Of all participants, 40% took at least one vacation trip by car
- Of those taking at least one trip, 86% took at least one vacation trip by car

Base: All LGBTQ participants n= 1,342, Taking at least one vacation n=618
 Additional questions: During the past 6 months (May 1 to present), how many overnight vacation trips did you take by airplane? and During the past 6 months (May 1 to present), how many overnight vacation trips did you take by car?

Future Travel this coming Winter/Spring: Most LGBTQ participants (63%) hope to take a trip over the next six months. However, very few have actually made any arrangements to date. The type of destination is varied.

What is your best guess on the number of overnight vacation trips you are likely to take for the next six months, Nov 1, 2020 to April 30, 2021 (by plane, train or car)?
Do not include business trips.

Asked of All LGBTQ Participants	
One	26%
Two	20%
Three	10%
Four	3%
Five or More	4%
None, I do not plan to travel for vacation in the next 6 months	37%

Planning: Of those considering at least one trip, only 30% have actually made arrangements. Very few of those actual booking are in 2021; most are in November and December 2020.

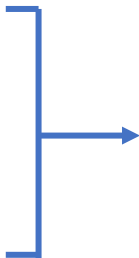
During the next six months, to which types of destinations are you likely to travel for vacation (not for business)?
Please mark all that apply.

Asked of All LGBTQ Participants	
Visit a big city / metro area for vacation	25%
Visit a small town destination for vacation	29%
Visit a beach destination for vacation	21%
Visit an outdoor adventure destination for vacation	18%
Travel internationally to any country outside of the USA for vacation	6%
Take a cruise vacation	2%
Other type of vacation trip than listed	10%
I do not expect to travel for vacation in the next 6 months	36%

Future Travel by Demographic: Cisgender men and women are about equal in their intention to take a vacation trip in the next six months. There are significant generational differences, with younger participants being more likely to plan a trip.

What is your best guess on the number of overnight vacation trips you are likely to take for the next six months, Nov 1, 2020 to April 30, 2021 (by plane, train or car)? Do not include business trips.

Asked of All LGBTQ Participants	
One	26%
Two	20%
Three	10%
Four	3%
Five or More	4%
None, I do not plan to travel for vacation in the next 6 months	37%



Percentage of Participants Planning to Take At Least One Trip in the Next Six Months

By Demographic	
All LGBTQ Participants	63%
Lesbian & Bi+ Women	64%
Gay & Bi+ Men	66%
Transgender & Non-binary Participants	49%
Millennials+	69%
Generation X	60%
Baby Boomers+	58%

Planning: Of those considering at least one trip, only 30% have actually made arrangements. Very few of those actual bookings are in 2021; most are in November and December 2020.

Base: All LGBTQ participants n= 1,342.

Car vs. Airplane Travel for Vacations: Among LGBTQ participants planning to take a vacation, most are leaning towards car vacations during the coming six months. Only 37% of all participants are willing to take a plane vacation through the end of 2021. For those planning to travel by airplane, distance does not appear to be a major concern. For those planning to fly through 2021, gay/bi+ men were the most likely to indicate a vacation by plane at 45%, much higher than lesbian/bi+ women and transgender/non-Binary participants. The variation by generation was within 5%, with Generation X being most likely to fly (40%).

During the next six months (Nov 1, 2020 to April 30, 2021), where are these likely vacation destinations located?
Please mark all that apply.

<i>Among LGBTQ Travelers Planning Vacations</i>	
Within driving distance from my home	73%
Longer flight distance (more than 2 hours) in the mainland USA	27%
Shorter flight distance (2 hours or less) in the mainland USA	25%
Mexico	8%
Caribbean	4%
Europe	4%
Canada	3%
Hawaii	3%
Central/South America	2%
Asia, Australia/New Zealand/Oceania, Africa	<1% for each

Base: LGBTQ Planning a Vacation N=867

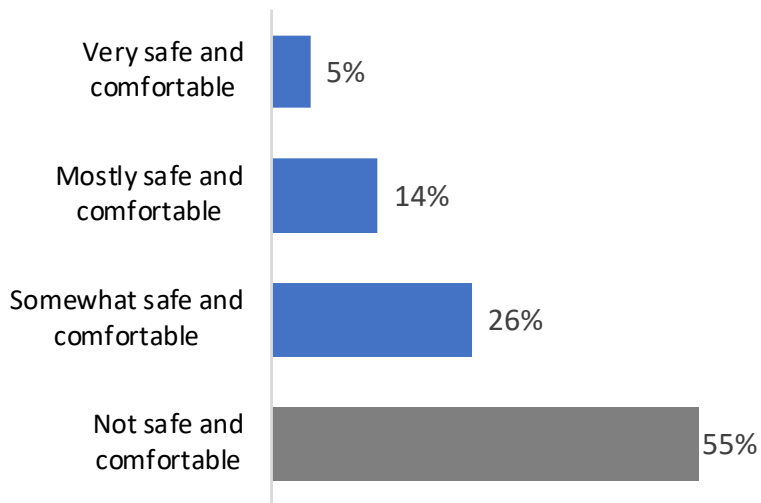
When are you likely to take your next airplane trip for vacation (not for business)?

<i>Among ALL LGBTQ Participants</i>	
November or December 2020	13%
January to March 2021	8%
April to June 2021	7%
July to September 2021	6%
October to December 2021	3%
After 2021	8%
Never	2%
I need to wait and see how the pandemic progresses to make this decision	52%

Base: All LGBTQ participants n= 1,342.

Airline Safety: 19% of LGBTQ community members feel very or mostly safe flying right now; 45% indicated at least somewhat safe. Most want airlines to enforce strict precautions to improve air travel safety.

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



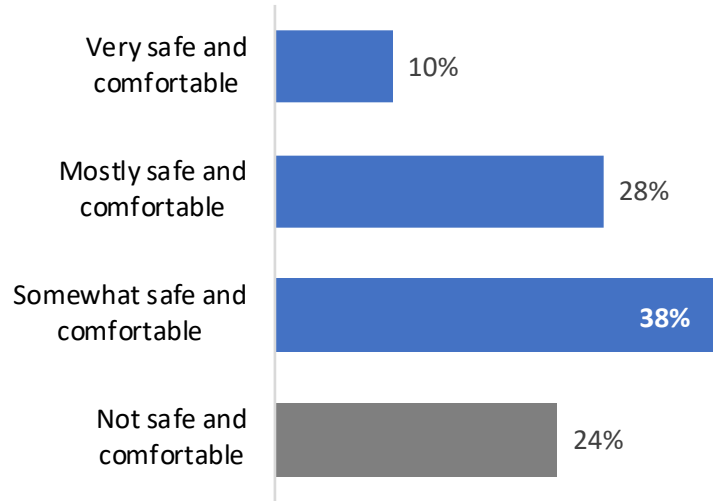
If you were to fly in an airplane, what are the most important things that an airline can do to make you feel safe? (Please mark all that apply.)

Airline crew enforces that passengers properly wear masks at all times	85%
All airlines staff required to wear masks	83%
Thoroughly clean and disinfect planes between trips	82%
Leave middle seats unsold	81%
Add social distancing procedures for boarding and departing planes	78%
Temperature checks for passengers before boarding	63%
Gates have contactless check-in procedures	53%
Service, like food and drinks, is minimal	38%
I believe airlines should not operate yet for vacation travel	16%
None of the above are important to me	3%

Base: All LGBTQ participants n= 1,342 for both questions.

Hotel Safety: 38% of LGBTQ community members feel very or mostly safe staying in a hotel right now; 76% indicated at least somewhat safe. Most participants want hotels to enforce strict precautions to improve hotel stay safety.

Regardless of your travel plans, how safe and comfortable do you feel about staying in a hotel in regards to COVID-19?



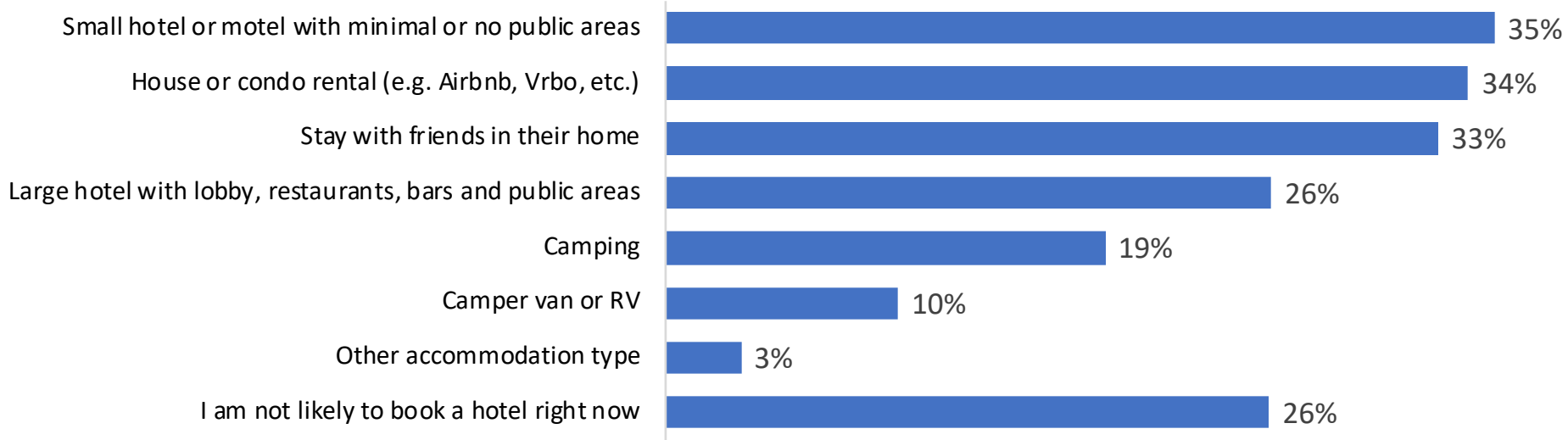
Base: All LGBTQ participants n= 1,342 for both questions.

If you were to stay in a hotel, what are the most important things that a hotel can do to make you feel safe? (Please mark all that apply.)

All hotel staff are wearing face covers	86%
Hotel staff enforces that all guests properly wear masks in common areas	86%
Hotel increases disinfection/cleaning of rooms between guest stays	84%
Hotel front desk area has social distancing requirements between guests and staff	77%
Hotel has a posted physical distancing policy for staff and guests as you enter hotel	72%
Hotel leaves rooms vacant for at least one day between guest stays	64%
Hotel has posted COVID-19 safety information on their website	57%
Hotel has contactless check-in/out procedures	55%
Gathering spaces are closed (e.g. restaurants and bars)	47%
Hotel has smartphone / keyless room entry	44%
I believe hotels should not operate yet	7%
None of the above are important to me	3%

Types of Hotels: LGBTQ travelers are considering a number of different accommodation types. This chart demonstrates that travelers may be more open to alternative accommodation options at this moment. Larger hotels will need to prove to travelers that they are a safe accommodation option.

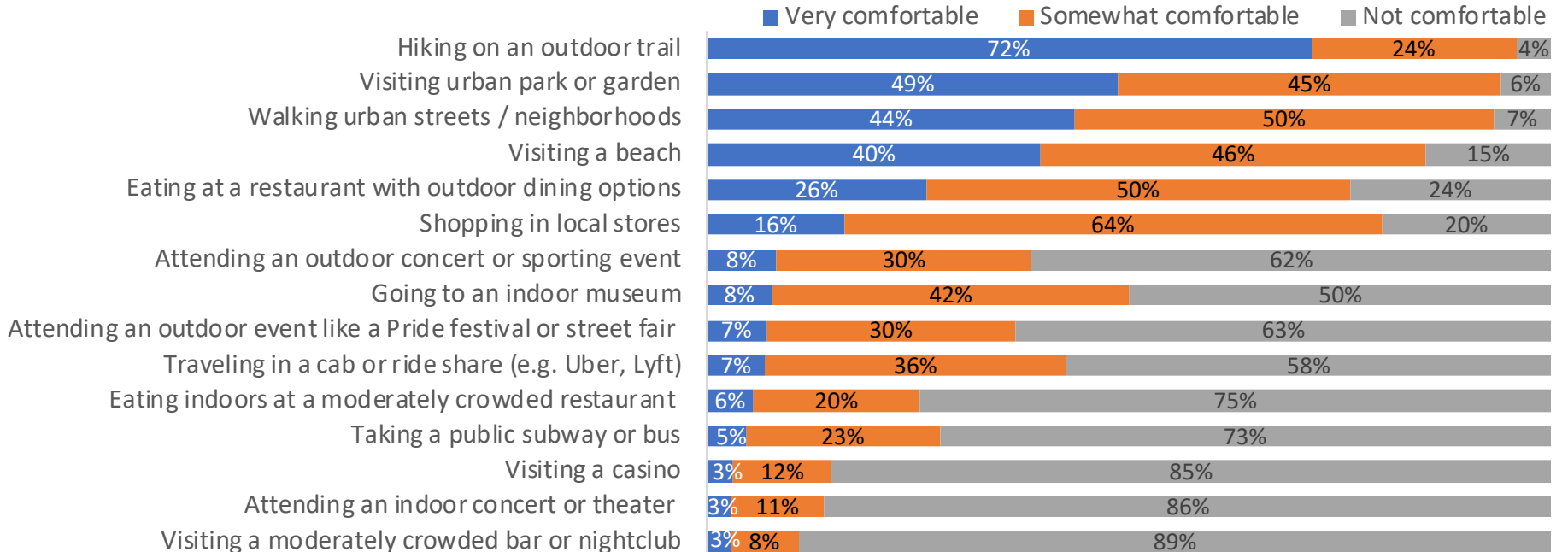
**If planning a vacation, in which types of accommodations are you likely to book?
Please mark any that you consider to be a comfortable and safe option for you.**



Base: All LGBTQ participants n= 1,342.

Activities While Traveling on Vacation: For the near future, LGBTQ travelers feel most safe and comfortable participating in activities in outdoor spaces and without crowds. These types of activities are available in all destinations, including big cities. Compared to May, the comfort level for outdoor activities has increased, while the comfort level for indoor activities has remained consistently low.

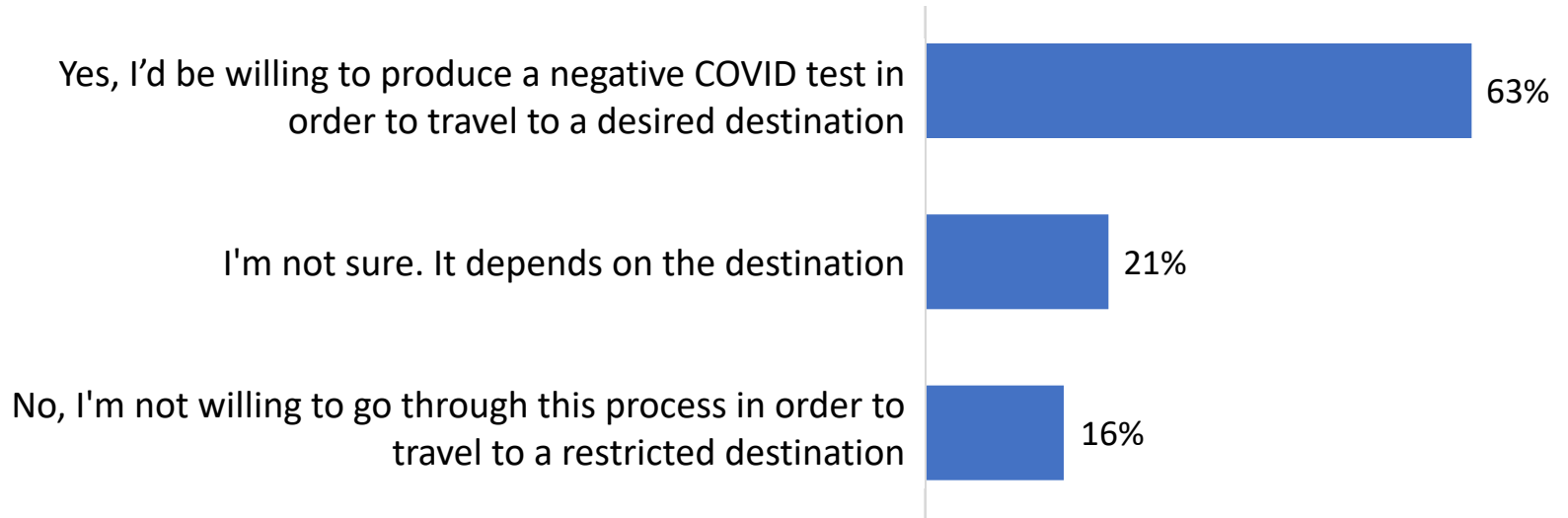
Right now, how safe and comfortable do you feel participating in these types of activities while traveling on vacation?



Base: All LGBTQ participants n= 1,342.

Testing and Destination: Most LGBTQ travelers are willing to take a COVID test as a requirement to travel to a destination.

Some previously-restricted destinations are opening up to travelers who test negative for COVID-19 prior to arrival. Assuming that you have assurances that airlines and hotels would offer a refund if you tested positive, would you be willing to take a COVID test prior to travel, if a negative result allowed you to enter the destination?



Base: All LGBTQ participants n= 1,342.



Additional Insights from CMI's May 2020 LGBTQ COVID Travel Report

Download the full May report:
<https://cmi.info/documents/temp/LGBTQ-COVID-Travel-2020.pdf>

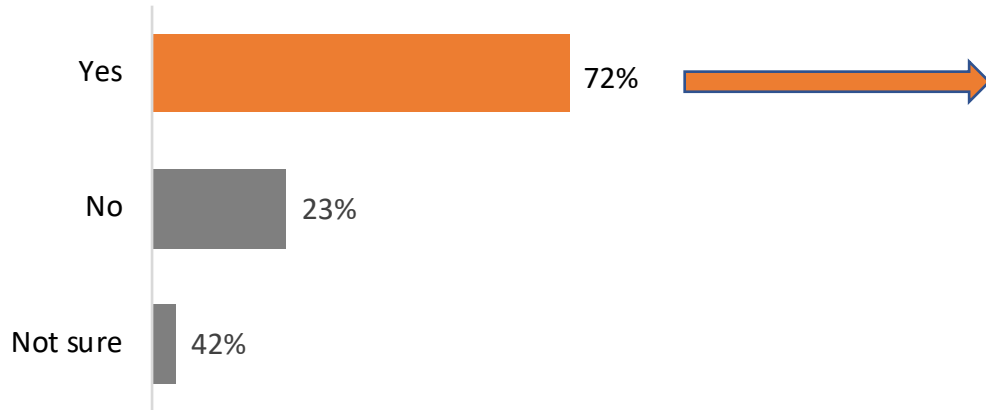
From May 2020 Report: While at Home: Activities at home during the COVID-19 lockdown may give travel companies insight into future LGBTQ traveler motivations, e.g. an increased interest in cooking new foods might yield an interest in a destination’s regional cooking classes.

Because of COVID-19, which of these activities did you participate in at home more than usual? (Please mark all that apply.)	All LGBTQ Participants	Lesbian & Bi+ Women	Gay & Bi+ Men	Transgender & Non-binary Participants	Millennials +	Generation X	Baby Boomers
Watching more TV shows and movies	67%	66%	69%	59%	71%	66%	64%
Voice or video calls with friends and family	58%	65%	53%	38%	69%	59%	45%
Social media	52%	52%	52%	45%	58%	51%	45%
Cooking / baking new foods	51%	53%	51%	38%	57%	50%	46%
Work at home	48%	52%	44%	38%	60%	52%	31%
Extra cleaning of the house	46%	46%	47%	39%	50%	47%	41%
More time with pet(s)	44%	53%	34%	42%	46%	46%	40%
Reading	42%	47%	36%	42%	44%	38%	44%
Home repairs and projects	38%	39%	37%	34%	35%	40%	40%
Biking, walking or jogging for exercise	34%	37%	34%	21%	41%	32%	31%
Exercise in my home, yard or garage	32%	37%	28%	25%	39%	31%	27%
Gaming	24%	22%	24%	33%	40%	21%	11%
Donated to charities	20%	25%	16%	19%	22%	19%	20%
Reconnecting with people I live with	16%	20%	13%	16%	24%	16%	10%
Yoga or meditation	15%	21%	9%	11%	22%	13%	8%
I worked during this time and had no extra time	13%	14%	11%	21%	12%	18%	10%
Took classes / learned new skills	13%	15%	10%	15%	18%	12%	9%
Future travel planning	12%	13%	12%	6%	13%	11%	12%
Volunteer work	5%	7%	4%	5%	6%	5%	5%

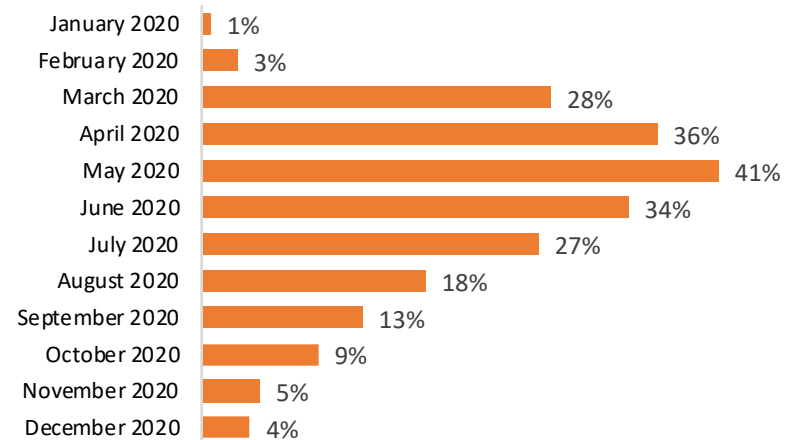
Base: All LGBTQ participants n= 1,864.

From May 2020 Report: Trip Cancellations Among LGBTQ Travelers: 72% of the LGBTQ travelers have already canceled a vacation in 2020 because of COVID-19. This is both an impressive and unfortunate number, and demonstrates the tremendous revenue loss for the travel industry. Cancellations were strongest for March through July 2020. While there was a significant cancellation for the summer of 2020, there is opportunity to “pick up” new travelers who may now be making alternative or new summer travel plans as the economy starts to open.

Because of COVID-19, did you cancel any vacation travel plans for 2020? (Please mark all that apply.)
Among LGBTQ Vacation Travelers



Of trip(s) that you canceled, in which months were the vacation trips originally planned? (Please select any months that apply.)



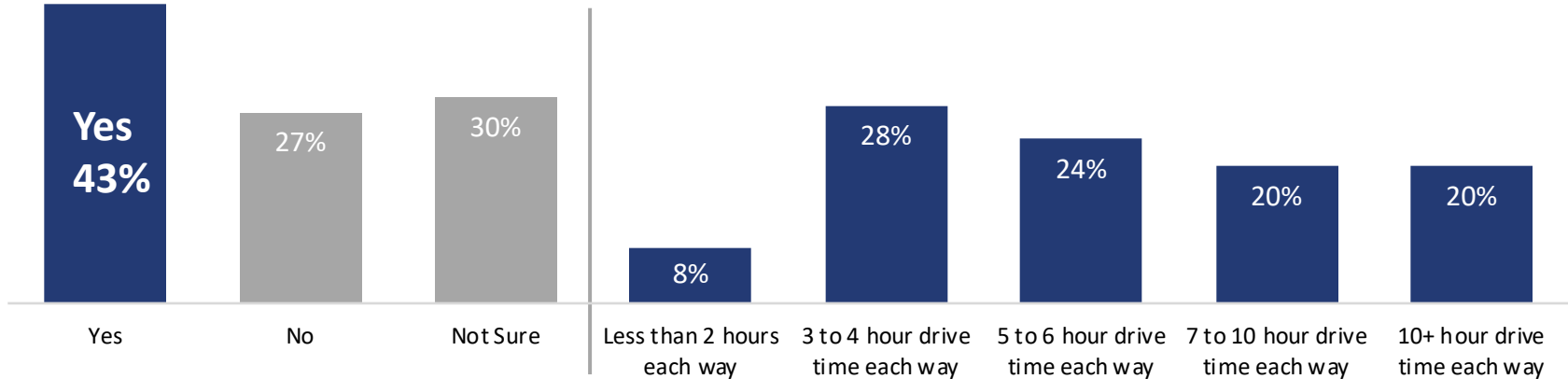
Base: LGBTQ Vacation Travelers n=1,566.

From May 2020 Report: Car Vacations: There is strong interest in auto-based vacation travel this summer. For LGBTQ travelers not yet comfortable traveling by airplane, an auto-based vacation provides a safer option. Of interest, visitors’ acceptable drive times may be longer than many destinations assume to be true. This may be a trade-off: LGBTQ travelers are more willing to take a drive trip this summer compared to past years.



Are you likely to take an overnight car or driving vacation **this summer?**

Realistically, how far are you willing to travel for an overnight car/driving vacation? (Please mark just one response, the farthest you would be willing to travel by car each way.)



All LGBTQ Vacation Travelers n=1,566. Those who said yes to a car vacation n=673.

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



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

For more information, contact

David Paisley, Senior Research Director

david@CMI.info



LGBTQ Market Research:

There is a difference!

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

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

CMI'S PROPRIETARY PANEL

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

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

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

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

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

CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS

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

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

GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH

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

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

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

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

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

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

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

VALUE FOR THE INVESTMENT

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

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

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

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



CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

LGBTQ Research Panel 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

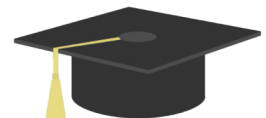
35%
Representing
LGBTQ
Communities
of Color



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 Research and Corporate Training

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

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

Certificate Number: **10013**
Expiration Date: **03/31/22**
Renewal required by date above



The National LGBT Chamber of Commerce

Hereby Recognizes:

LGBTQ, Inc

As a Certified LGBT Business Enterprise™

(LGBTBE)



Justin G. Nelson
Co-Founder & President



Chance E. Mitchell
Co-Founder & CEO

nglcc 
Certified LGBTBE