



首届中国LGBT群体生活消费指数调查报告

合作发起方:



关于我们

20余载LGBT视角



- › 社群营销&视角（CMI）团队在LGBT群体消费者调查研究方面具有20年经验。我们在北美及欧洲的调查手段包括互联网在线问卷、电话采访、拦截调查、焦点小组座谈（现场及在线）及咨询委员会。世界各地的行业领袖都依据CMI的研究分析结果作为可行性评估、市场定位、经济影响、广告创意及品牌测试、前景预测、可测性市场计划及投资回报评估的依据。
- › CMI的主要调研成果已被纽约时报、华盛顿邮报、芝加哥论坛报、洛杉矶时报、华尔街日报、福布斯杂志、今日美国、迈阿密先锋报、CBS新闻、国家公共电台、美联社及其他各大媒体报道。
- › CMI的客户来自各行各业。近几年我们已为包括保德信金融集团、富国银行、安泰保险、塔基特品牌、太阳信托银行、强生、WNBA、OraSure、瑞士信贷、豪洛捷公司、易保保险、莫氏医美、绝对伏特加、纽约旅游局、费城旅游局、拉斯维加斯会议旅游局、凯悦酒店集团、多伦多旅游局、西班牙旅游办公室、夏威夷航空、美国人口调查局、美国癌症协会、凯撒家庭基金会及其他来自美国及世界各地的企业及机构提供专门定制的调研服务。





上海同志商务是为中国同志雇员服务的一个非营利商务网同时也是与各大企业关于LGBT平等共融对话与合作的平台，这次很荣幸能史无前例地联合20家中国LGBT小组、媒体及组织来共同进行此次调查。

作为首届“中国粉红市场大会”的组织者，我很高兴可以携手社群营销&视角、淡蓝网/Blued、The L共同发起此次调查，并对20家社区合作伙伴每一家都能贡献至少100份问卷的结果感到欣慰。你们的努力已创造历史。

诚挚的，
毕信乐（Steven Paul Bielinski）
上海同志商务创始人

每年社群营销&视角都会为各大品牌提供定制LGBT调研服务，我们的客户包括：



研究设计

20余载LGBT视角

目标人群:



- › 居住在中国的18岁及以上LGBT（女同志、男同志、双性恋、跨性别）人群。
- › 受访者来自CMI现有调研小组及20个中国大陆地区的LGBT社区合作伙伴。
- › 合作伙伴包括：淡蓝网/Blued、The L-女同社交应用、上海同志商务、拉拉风向标、上海骄傲节、中国同性恋亲友会、基调杂志、北京纪安德咨询中心、花样年华重庆同心工作组、同到、成都同乐、直同道合、上海女爱、智同广州同志中心、高校基友会、酷拉时报、Sunshine觅初、同语、OUTER及舆观。

研究方法:



- › 此份针对LGBT消费者的综合性在线问卷在经过移动优化后通过邮件形式发送给了CMI调查小组的中国区成员，同时20个社区合作伙伴通过其网站、社交媒体、邮件等形式对问卷进行推广。
- › 更重要的是，此次调查的样本代表了合作LGBT媒体、组织及活动的用户及参与者人群，这使得此次调查结果可以高度代表LGBT社群消费者。



内容摘要

- 在中国，年轻人的出柜程度更高、参加LGBT社群建设更积极。公司在向中国LGBT群体做推广时所使用的影像、语言及媒介应符合年轻群体特征。
- 虽然参与此次调查的男性多于女性，但调查结果显示女同志/女双性恋更倾向于向朋友、家人及同事出柜，而男同志/男双性恋更有可能完全没有出柜。男性女性市场都表现出足够的潜力。与这两个群体有效的沟通将是企业向中国LGBT群体做推广的重要一环。
- 53%的受访者表示企业对LGBT相关政策法规的支持对其作出购买决策有最大程度的影响。由于无论在生活还是工作上LGBT人群都缺少相关的法律保护，LGBT相关政策法规一直以来都是中国LGBT人群关注的焦点。当向LGBT群体营销时，企业应表态支持相关政策并通过LGBT组织及活动并在条件允许的情况下尽量通过主流媒体将此信息传递出去。这种由企业带头的方式在美国已经取得很大成功，公司政策的改变使得LGBT群体在社会、政治及经济方面取得进步，这比政府立法要早很多。
- 虽然在中国LGBT人群分布在各行各业，但调查中人数最多的五个行业分别是广告/营销/公关、金融服务/会计、科技/IT/互联网、制造业和教育。职场平等对LGBT人群来说十分重要。通过在内部建立无性取向歧视雇佣政策，企业将会吸引最顶尖的LGBT人才，这些雇员通常会成为企业的拥护者从而最终帮助企业提高业绩。



内容摘要

- 80%的受访者尤其是年轻学生（85%）表示他们最担心来自家庭的压力。家庭在中国LGBT人群的生活中扮演重要角色。企业若能传递家人支持LGBT的信息，这将会与LGBT消费者间建立一条特殊的情感纽带。
- 年轻的中国LGBT群体十分沉迷于移动设备——71%的所有受访者及76%的18至21岁的学生过去12个月内购买了智能手机，91%的受访者在过去12个月内用移动设备上网购物。由于大多数中国LGBT人群使用移动设备进行日常沟通，向LGBT群体进行推广的企业应确保其移动体验充分考虑到这部分人群，这包括在移动优化网站或应用中添加同性伴侣影像并确保采用性别中立的广告用词（如当提及一对伴侣时，不使用“他和她”。）
- 即时聊天工具及社交媒体已成为中国LGBT人群最广泛使用的私人沟通工具。95%和81%的受访者表示在使用社交媒体进行私人沟通中经常会使用微信和微博，这使得微信和微博成为LGBT人群最经常使用的非LGBT类社交媒体。18至21岁的学生与25岁及以上的LGBT人士相比使用微博的频率更高，而25岁及以上的LGBT人士使用微信的频率更高。企业向LGBT群体做推广时应提高社交媒体营销的比重并确保内容对LGBT人群有足够包容和支持。
- 二维码、团购网及社交媒体评论是LGBT人群每周参与最多的广告形式。研究发现在媒介消费方面男女存在着差异。这其中，男同志/男双性恋在LGBT应用（45%）及LGBT网站/博客（44%）中投入更多精力，而女同志/女双性恋则在电视节目（42%）和网络流式视频节目（42%）中投入更多的精力。



内容摘要

- 研究认为在LGBT手机应用及LGBT网站/博客上投放广告将会给大量中国LGBT受众留下印象。
- 女同志/女双性恋在境内境外旅游的比例都高于男同志/双性恋。68%的女同志/女双性恋及53%的男同志/男双性恋在过去的12个月内有至少一次在境内（不包括港澳台）的休闲旅游经历。中国LGBT最喜爱的目的地为北京、上海、杭州、成都及厦门。旅游在近几十年来一直是国际粉红经济的重要组成部分，从此次调查看来，中国的情况也是类似的。旅游及酒店业公司应充当粉红经济领导者的角色提供细分旅游产品并展开有效宣传。
- 受访者中49%的女同志/女双性恋及34%的男同志/男双性恋拥有有效护照，而这个比例在25岁及以上LGBT中上升至54%。30%的女同志/女同性恋及18%的男同志/男双性恋在过去的一年中有过至少一次的境外（包括港澳台）休闲旅游经历。除港澳台外，其他流行的亚洲目的地包括泰国、韩国、日本及马来西亚。美国及欧洲国家也很受中国LGBT游客的欢迎。市场营销者可通过与对LGBT人群友善的目的地旅游局合作来向中国LGBT消费者进行推广他们的产品。
- LGBT们的旅行伴侣多元化，他们会和异性恋朋友、LGBT朋友、同性伴侣或家人一同出游。虽然经济型酒店及中档酒店是他们旅游出行时的首选，和其他LGBT结伴出国（包括港澳台）旅行的受访者倾向于预订更多的精品及豪华酒店。由于LGBT人群收入水平各不相同，商家应提供多种类型的住宿以满足不同层次LGBT旅行者的需求。



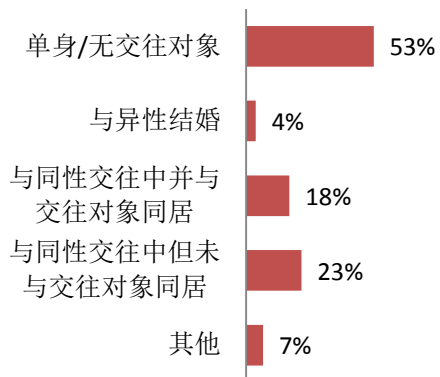
内容摘要

- 18%的受访者表示在过去的12个月内曾旅行去参加LGBT社群活动。与同性伴侣及LGBT朋友们一同出国旅行的受访者更倾向于参加LGBT活动。最受欢迎的LGBT活动为舞会/派对及骄傲活动。中国目的地应与LGBT活动策划师合作推广当地LGBT活动共同将目的地打造成LGBT人群的旅游胜地。

受访者分布

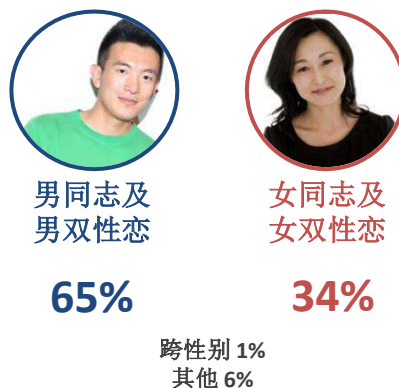


感情状况



由于为多选题目，所以总和超过100%。

自我认同

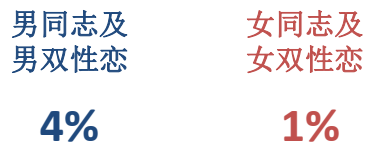


由于为多选题目，所以总和超过100%。

教育程度

学士学位	42%
大学专科	26%
硕士学位及以上	9%
高中学历/技术学校	16%

18岁以下子女



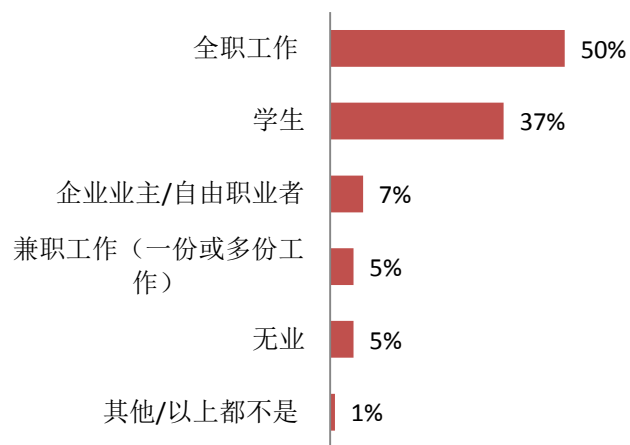
基数：所有 LGBT n=7,577



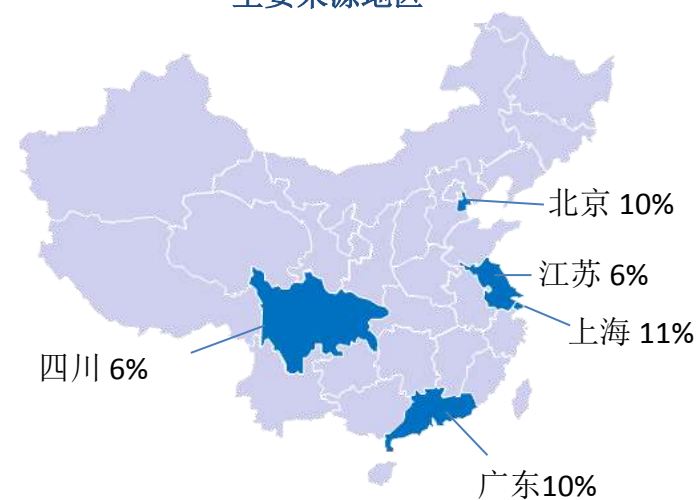
受访者分布



工作状况



主要来源地区



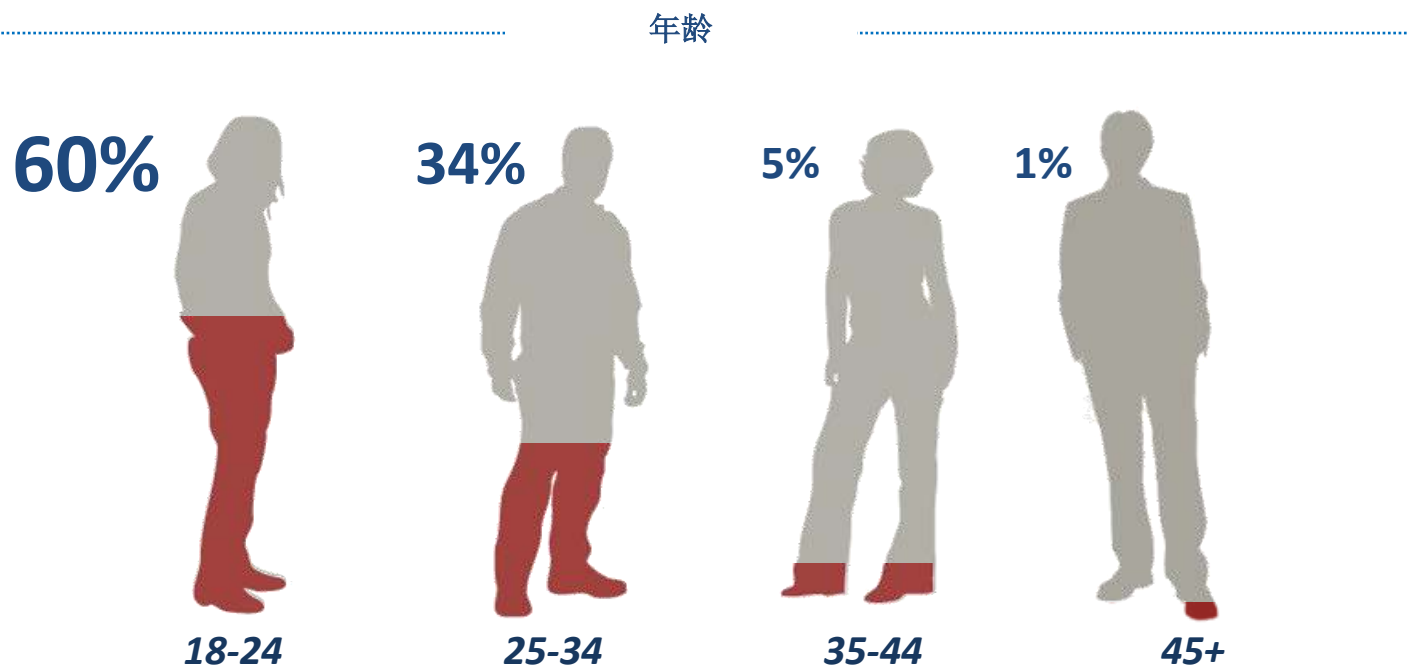
基数：所有 LGBT n=7,577



受访者分布



受访者年龄：此项需特别关注。与其他国家LGBT人群分布相比，此次中国LGBT调查吸引了大批年轻人，中值年龄只有23岁。在中国，年轻LGBT人群的出柜程度更高同时也更多的参与到LGBT社群建设中。

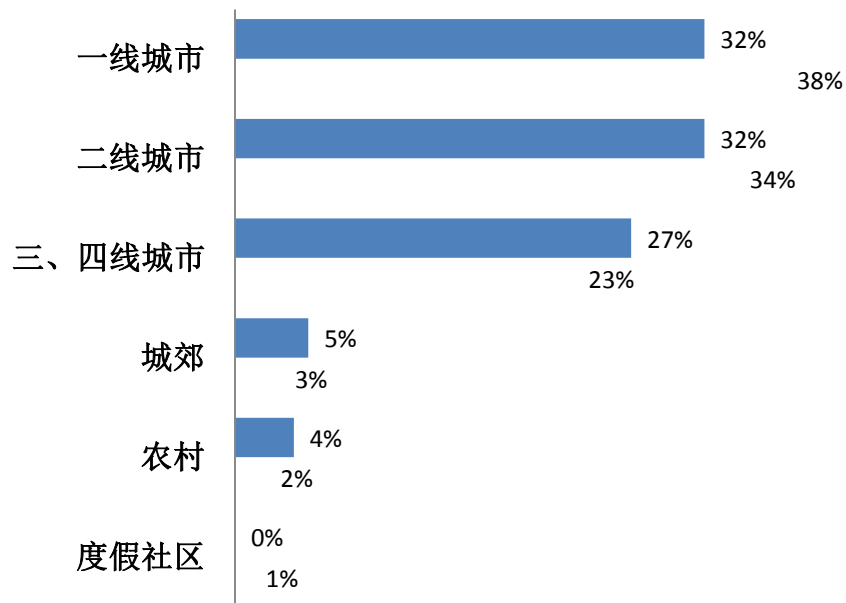


基数：所有 LGBT n=7,577

生活环境：受访者在各线城市中的分布比较平均。

以下哪项描述最接近您现在的生活环境？

- 男同志/男双性恋
- ▨ 女同志/女双性恋



若您目前居住在一线城市，您有离开大城市市区搬到城郊、二三线城市或农村的想法吗？



男同志/
男双性恋



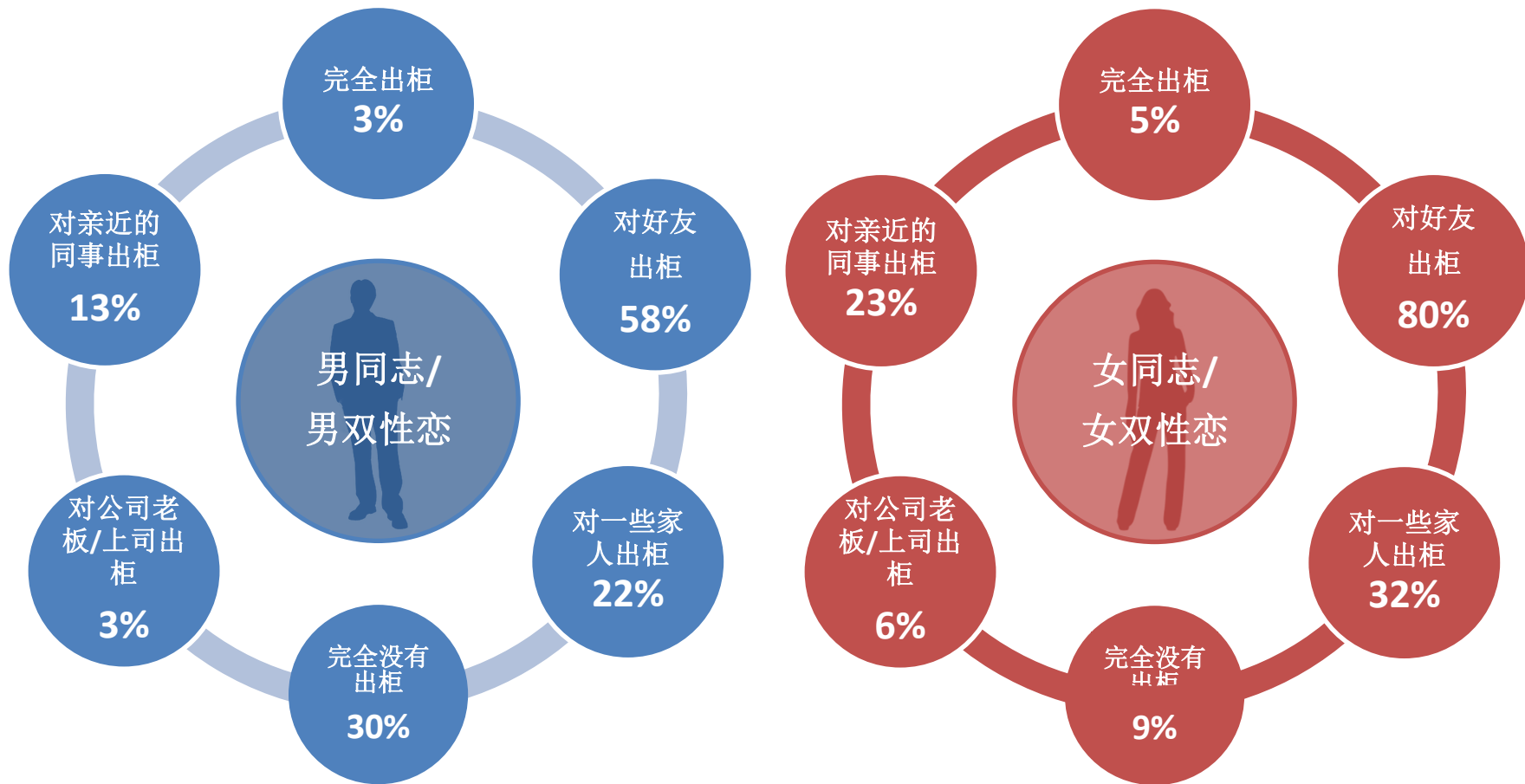
女同志/
女双性恋

想法	男同志/男双性恋 (%)	女同志/女双性恋 (%)
有	39%	32%
没有	48%	52%
不确定	13%	16%

基数：男同志/男双性恋 n=4,901；女同志/女双性恋 n=2,587；一线城市男同志/男双性恋 n=1,550 (32%)；一线城市女同志/女双性恋 n=984 (38%)

出柜： 尽管受访的男性和女性都不倾向于完全出柜（分别只有3%和5%），女同志/女双性恋相比于男同志/男双性恋更有可能向朋友、家人及同事出柜，男同志/男双性恋更有可能完全没有出柜。

您目前的出柜状态是？（请选择所有适用选项）



基数：*男同志/男双性恋n=4,887; *女同志/女双性恋n=2,576

出柜： 相比于25岁及以上LGBT人士，18-21岁学生更有可能向密友出柜（71%，25岁及以上人士为57%）但向家人出柜的比例更低。

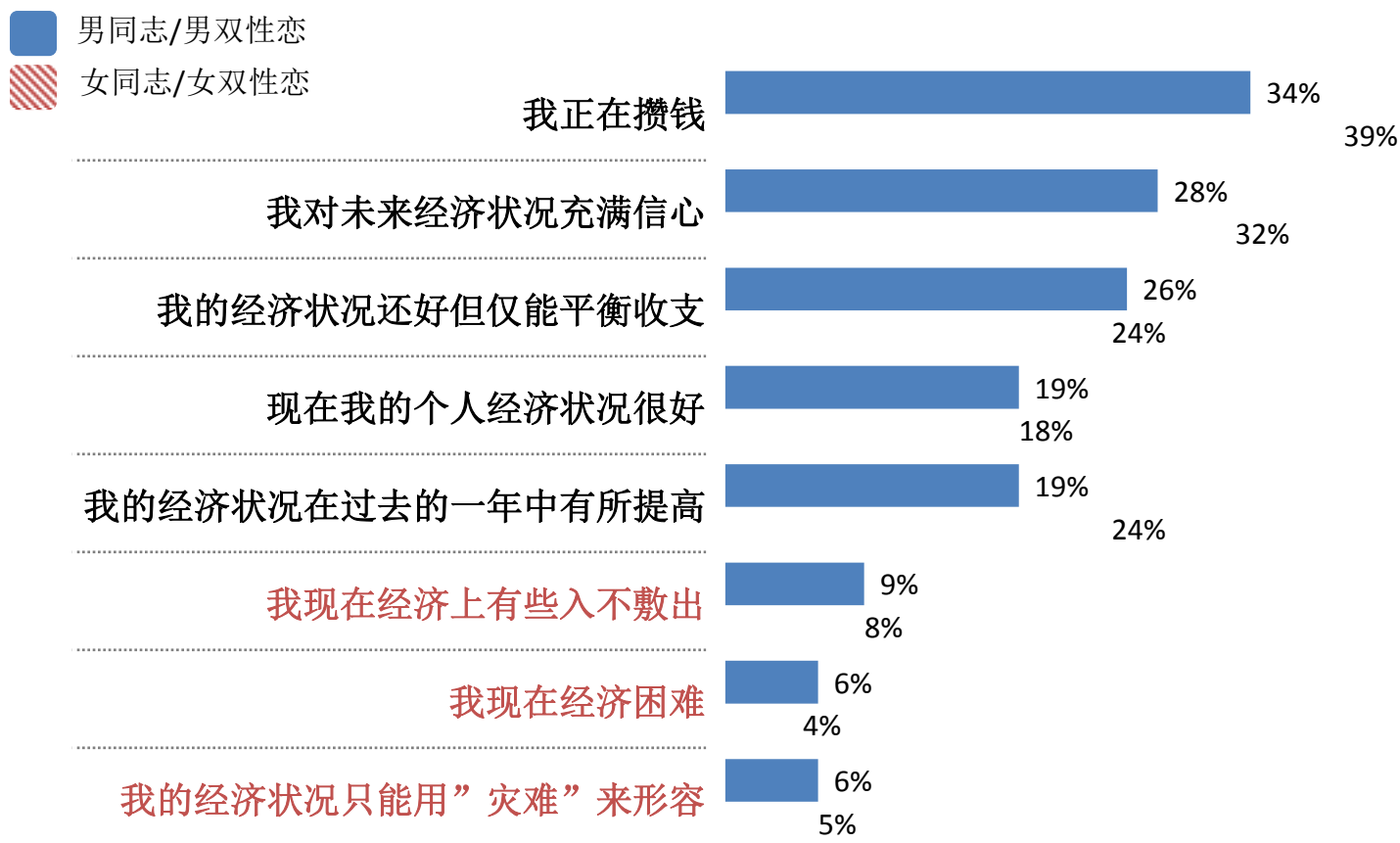
您目前的出柜状态是？（请选择所有适用选项）

	学生18-21岁	25岁及以上
对好友出柜	71%	57%
完全没有出柜	20%	27%
对一些家人出柜	19%	30%
对亲近的同事出柜	8%	19%
完全出柜	3%	4%
对公司老板/上司出柜	1%	5%

基数：学生18-21岁 n=1,843; 25岁及以上 n=2,925

财务状况: 39%的受访者选择至少一个积极选项，16%选择至少一个消极选项，另外45%持中立态度。

您目前的个人经济状况如何？（请选择所有适用选项）



基数: 男同志/男双性恋 n=4,865; 女同志/女双性恋 n=2,573

LGBT就业：中国LGBT人群分布在各行各业。

您所工作的行业是？（请选择所有适用选项）

	男同志/ 男双性恋	女同志/ 女双性恋
广告/市场营销/公关	10%	10%
制造业	10%	4%
科技/IT/互联网	8%	8%
政府部门/机关	8%	6%
教育	7%	8%
金融服务/会计	7%	10%
建筑/建筑工业	7%	5%
餐饮业服务（饭店、酒吧、咖啡厅等）	7%	8%
零售	6%	5%
医疗/保健/护理	6%	7%
平面艺术/设计	5%	7%
工程	4%	2%
娱乐/体育/休闲	3%	5%
餐饮业销售/营销	3%	3%
通信	3%	2%
媒体/记者/作家/作者	3%	3%
非营利/非政府机构	2%	1%
酒店	2%	1%
旅游	2%	2%
其他	10%	13%

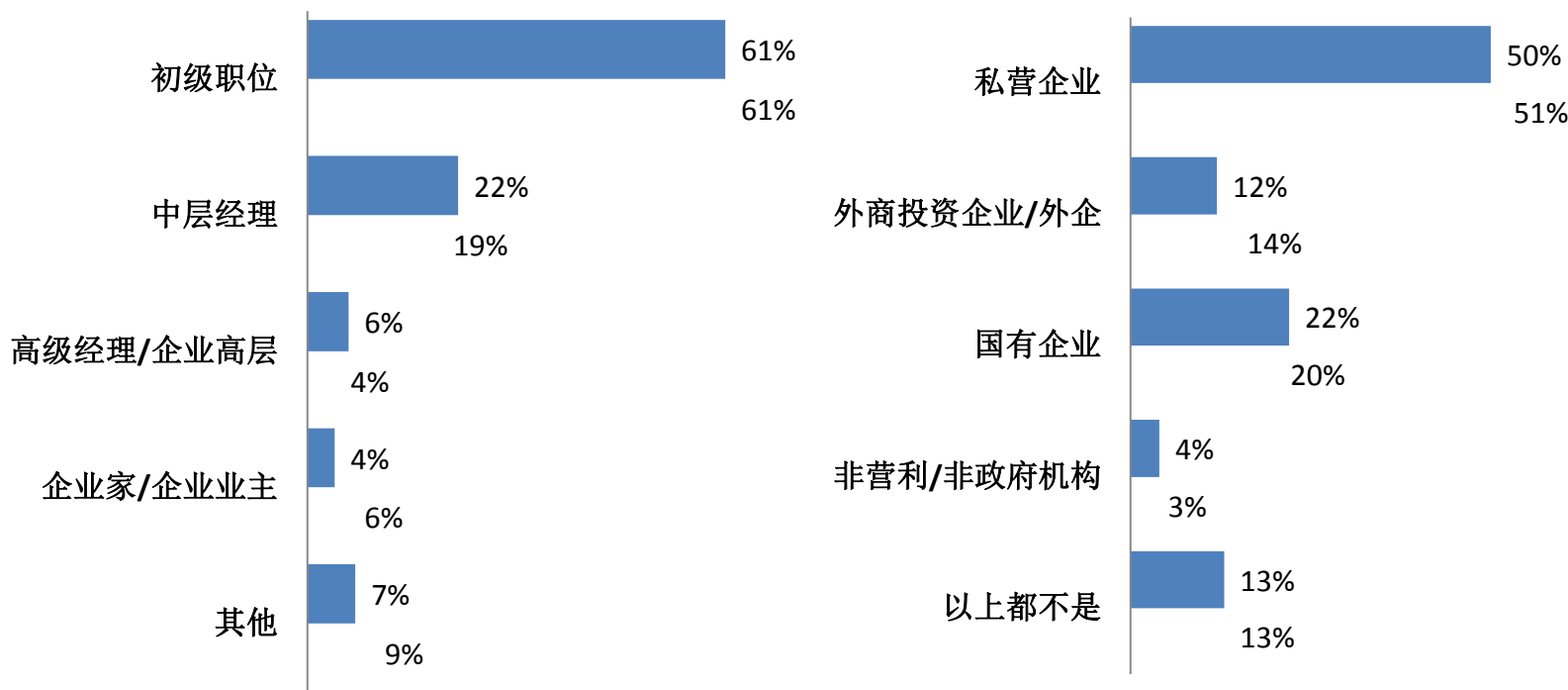


基数：女同志/女双性恋 n=1,546；男同志/男双性恋 n=2,957

LGBT就业：受访者多供职于私营企业或国有企业而且职位多处于公司底层或中层，这最有可能是由于他们年龄小并且刚进入职场不久造成的。

职位类型及公司类别

■ 男同志/男双性恋
 ■ 女同志/女双性恋

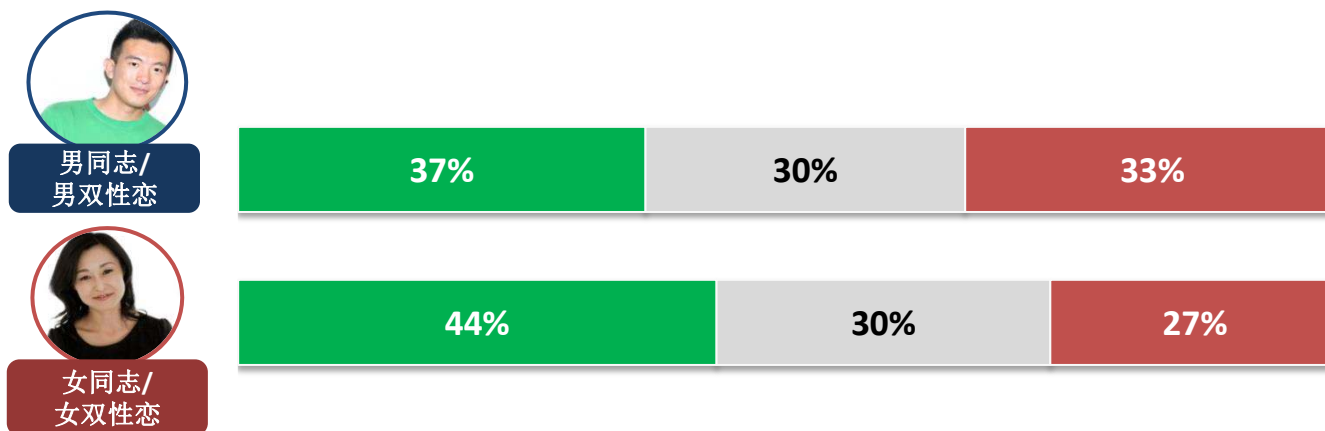


基数：女同志/女双性恋 n=1,546; 男同志/男双性恋 n=2,957

职场LGBT友善程度：女同志/双性恋更有可能认为其雇主是对LGBT/同志人群是友善的。只有31%的LGBT职业人士认为他们的雇主对LGBT人群是不友善的。

请评估您的职场对同志/LGBT人群的友善程度。
(1为很不友善/充满敌意, 10为很友善)

■ 较好的 /高于平均水平7-10
 ■ 平均水平 5-6
 ■ 较差的/低于平均水平1-4

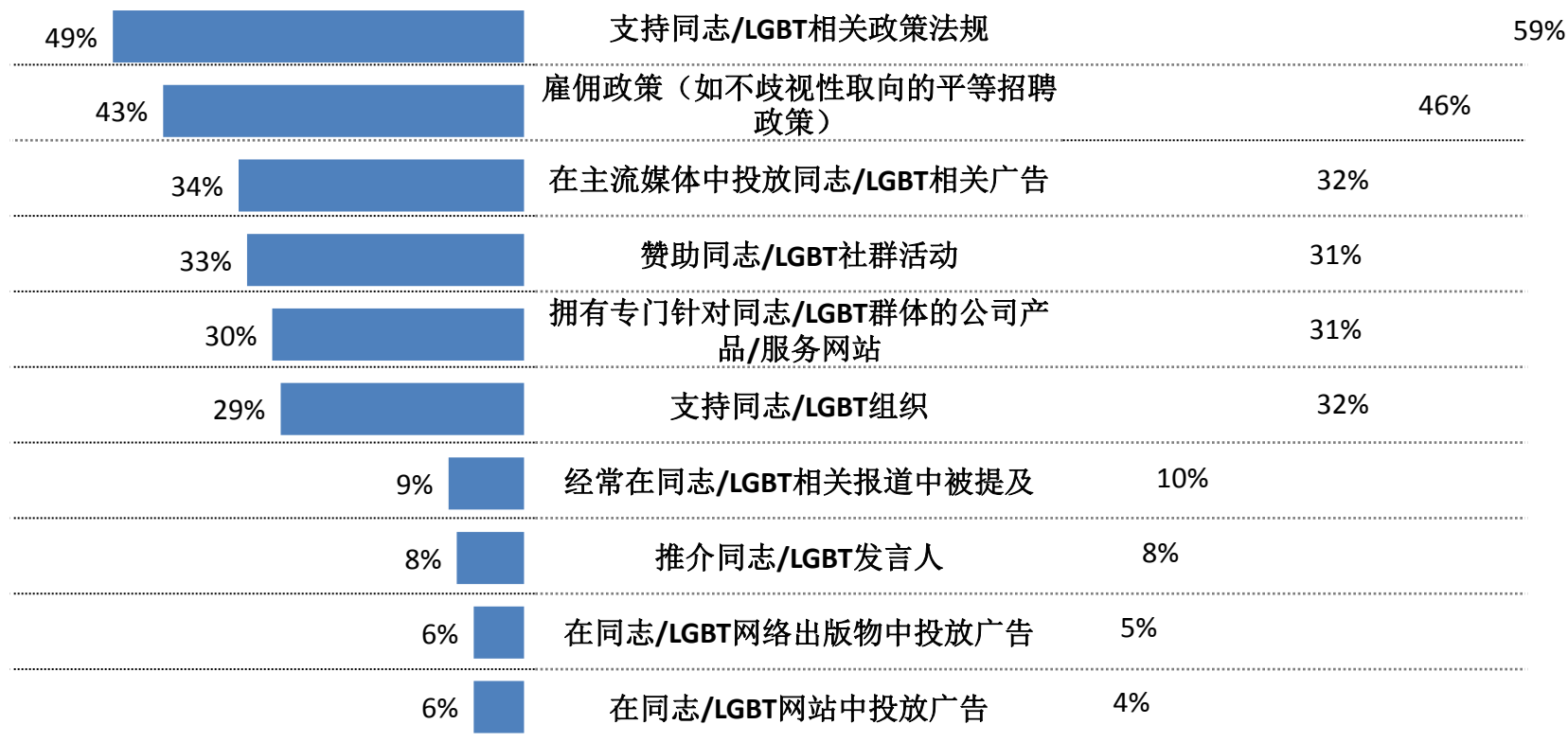


基数：女同志/女双性恋 n=1,547; 男同志/男双性恋 n=2,952

企业支持：男女受访者均认为支持LGBT相关政策法规及平等雇佣政策是最能影响其购买决定的途径。

若有商家/企业想要服务中国同志/LGBT群体，通过以下哪些途径最能影响您的购买决定？
(选择对您来说最有影响力的3项)

- 男同志/男双性恋
- ▨ 女同志/女双性恋

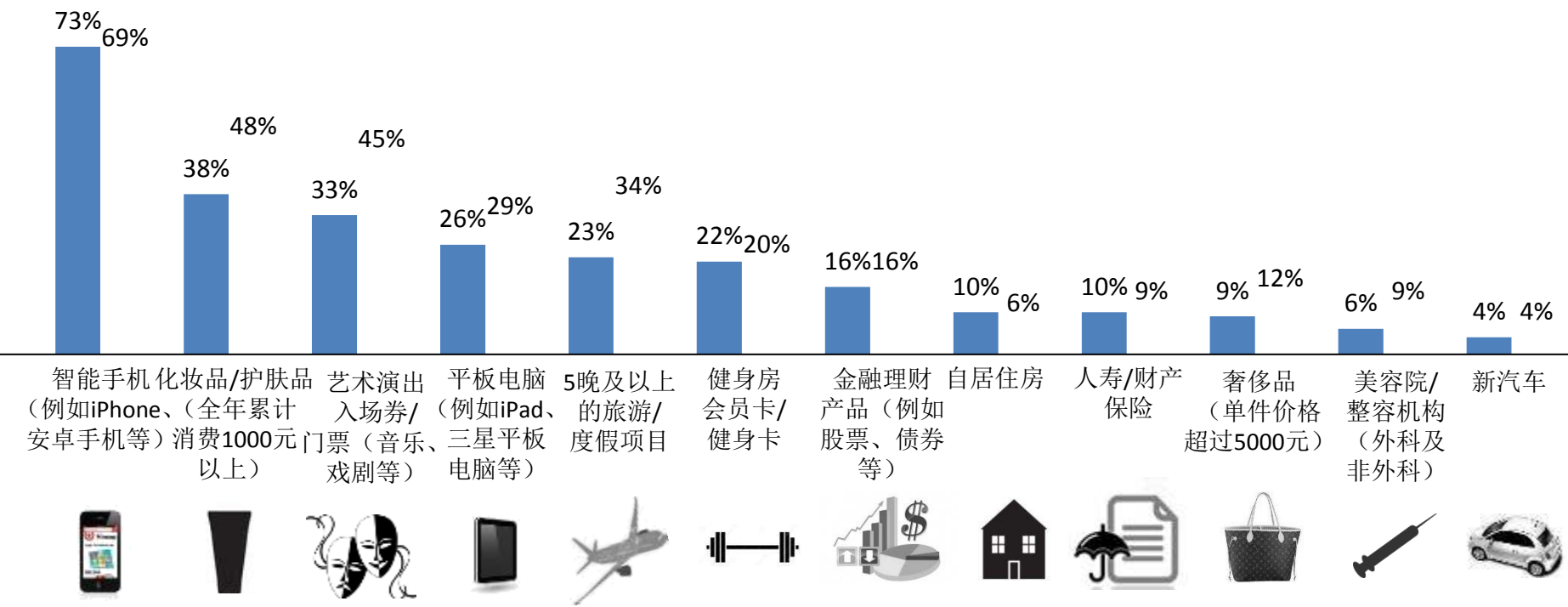


基数：男同志/男双性恋 n=4,786; 女同志/女双性恋 n=2,504

不同性别的购买行为： 相比于男同志/男双性恋，女同志/女双性恋会购买更多的护肤产品、演出门票及5晚以上的旅游度假项目。男同志/男双性恋更有可能购买如自居住房等高价商品。

您是否在过去的12个月中购买过以下商品或服务？
(请选择所有适用选项)

■ 男同志/男双性恋
■ 女同志/女双性恋

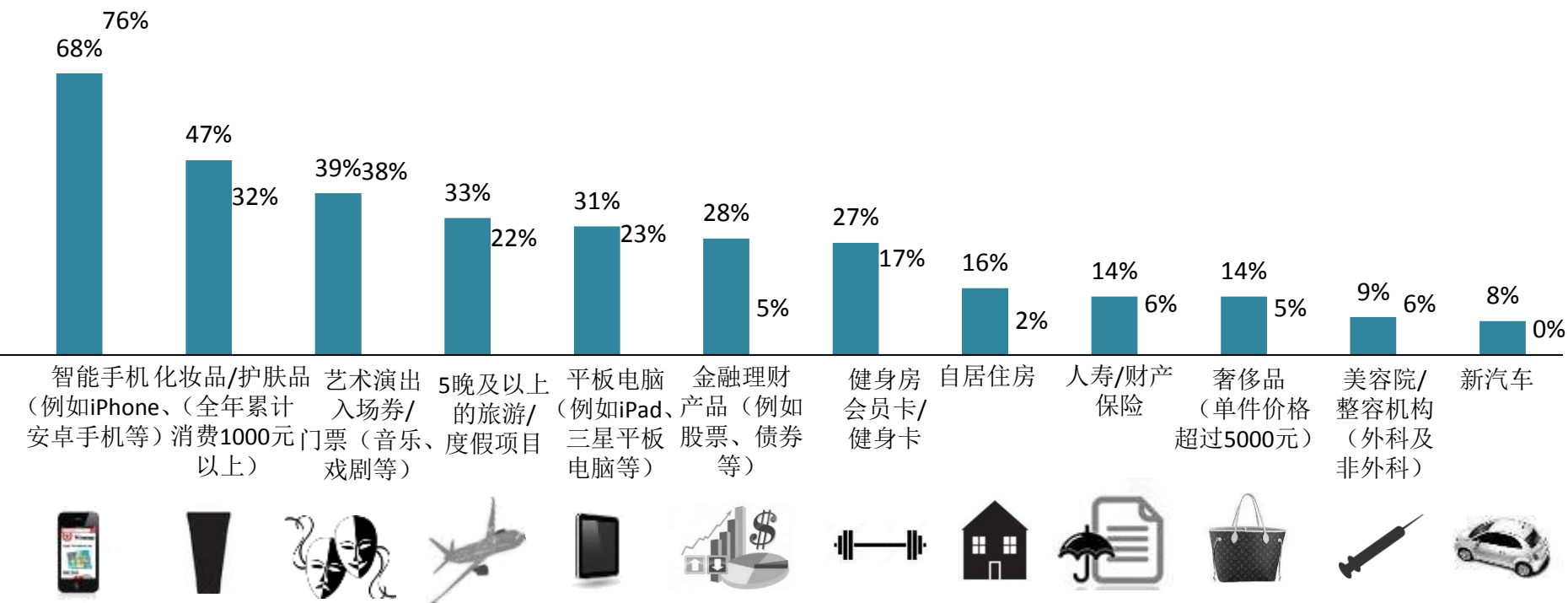


基数：男同志/男双性恋 n=4,636; 女同志/女双性恋 n=2,499

购买行为：不出意外，25岁及以上受访者在除了智能手机外的所有品类消费都超过18-21岁学生。

您是否在过去的12个月中购买过以下商品或服务？
(请选择所有适用选项)

■ 25岁及以上
▨ 学生18-21岁

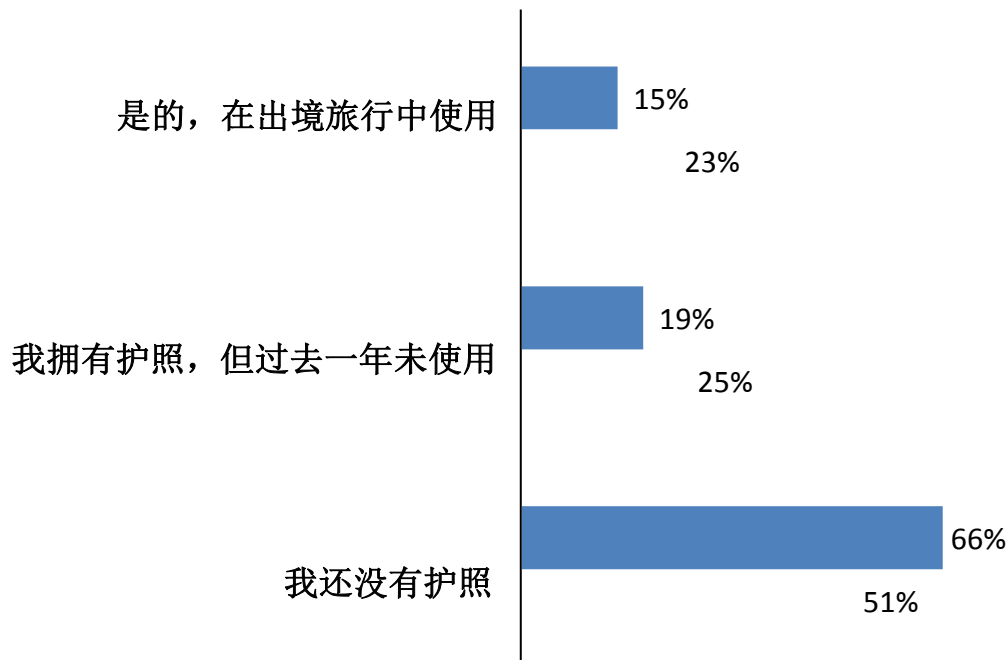


基数：学生18-21岁 n=1,709; 25岁及以上 n=2,867

护照使用：受访者中，34%的男同志/双性恋及49%的女同志/双性恋拥有有效护照。女同志/双性恋在过去12个月中出国旅行的比例高于男同志/双性恋。

在过去的12个月中，您有使用过您的护照吗？

- 男同志/男双性恋
- ▨ 女同志/女双性恋

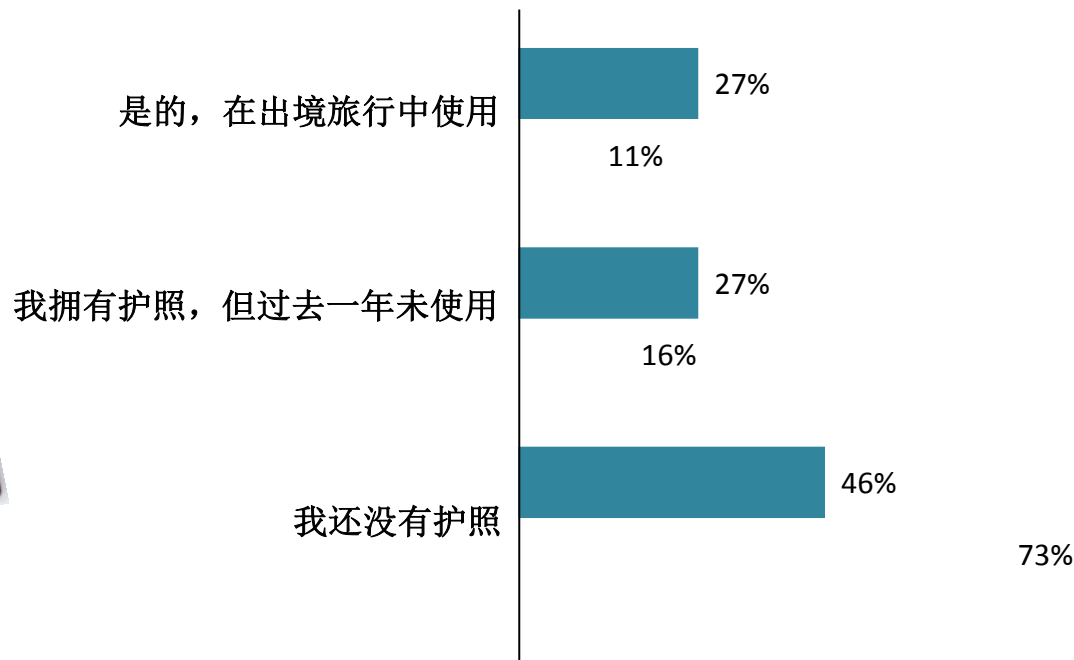


基数：男同志/男双性恋 n=4,889; 女同志/女双性恋 n=2,584

护照使用：只有27%的18-21岁学生拥有护照，但在拥有护照的这部分学生中，41%的人在过去12个月中曾出国旅行，这个比例与25岁及以上拥有护照人群的护照使用比例（50%）并没有太大差距。

在过去的12个月中，您有使用过您的护照吗？

- 25岁及以上
- 学生18-21岁



基数：学生18-21岁 n=1,850 (护照持有者 n=500); 25岁及以上 n=2,925 (护照持有者 n=1,580)

休闲旅游

在过去的12个月，您是否有在**国内**旅游度假
(港澳台除外)？

在过去的12个月，您是否有在**国外**旅游度假
(包括港澳台)？



女同志/
女双性恋

是!

68%



女同志/
女双性恋

是!

30%



男同志/
男双性恋

是!

53%



男同志/
男双性恋

是!

18%

基数：男同志/男双性恋 n=4,901; 女同志/女双性恋 n=2,58

20热门国内旅行目的地

对于那些在过去一年中曾在国内旅游度假的受访者：请列出您在过去一年中有在当地酒店过夜的国内旅行目的地（城市名）。（最多5个）



排名	目的地	参观%
1	北京	22.2%
2	上海	21.4%
3	杭州	15.7%
4	成都	13.7%
5	厦门	11.1%
6	广州	10.5%
7	南京	9.5%
8	西安	8.8%
9	深圳	8.1%
10	苏州	7.8%

排名	目的地	参观%
11	青岛	7.3%
12	重庆	7.1%
13	武汉	6.5%
14	天津	5.4%
15	长沙	5.4%
16	丽江	4.9%
17	大连	4.8%
18	昆明	4.5%
19	三亚	4.4%
20	桂林	3.7%

基数：曾在过去一年中在国内（港澳台除外）休闲旅行 n=3,942

国际旅行热门亚洲目的地

对于那些在过去一年中曾在国外（包括港澳台）旅游度假的受访者：在过去一年中您曾在以下哪些国家或地区度假并在当地酒店过夜？
（请选择所有适用选项）



81%
曾在亚洲旅行

亚洲目的地	男同志/男双性恋	女同志/女双性恋
香港	61%	58%
泰国	38%	29%
澳门	25%	24%
台湾	17%	14%
韩国	14%	15%
日本	12%	11%
马来西亚	12%	10%
新加坡	9%	7%
柬埔寨	5%	4%
马尔代夫	5%	2%
越南	4%	3%
印度尼西亚	3%	4%
菲律宾	3%	5%
阿联酋	2%	1%

Bases: 过去一年在国外（包括港澳台）休闲旅行n=1,712; 曾在亚洲旅行(81%) n=1,395; 男同志/男双性恋 n=727; 女同志/女双性恋 n=647

国际旅行热门欧洲目的地

对于那些在过去一年中曾在国外（包括港澳台）旅游度假的受访者：在过去一年中您曾在以下哪些国家或地区度假并在当地酒店过夜？
（请选择所有适用选项）



14%
曾在欧洲旅行

欧洲目的地	男同志/男双性恋	女同志/女双性恋
法国	37%	35%
德国	31%	26%
意大利	26%	27%
英国	21%	35%
瑞士	18%	21%
西班牙	17%	15%
荷兰	11%	16%
奥地利	9%	6%
俄罗斯	9%	6%
捷克	8%	2%
比利时	6%	10%
芬兰	6%	3%
希腊	6%	3%
瑞典	6%	7%
土耳其	6%	5%
丹麦	4%	3%
冰岛	4%	3%
爱尔兰	4%	4%
挪威	2%	5%

Bases: 过去一年在国外（包括港澳台）休闲旅行n=1,712; 曾在欧洲旅行(14%) n=241; 男同志/男双性恋 n=141; 同志/女双性恋 n=96

国际旅行热门其他目的地

对于那些在过去一年中曾在国外（包括港澳台）旅游度假的受访者：在过去一年中您曾在以下哪些国家或地区度假并在当地酒店过夜？
（请选择所有适用选项）



20%
曾在其他国际目的地旅行

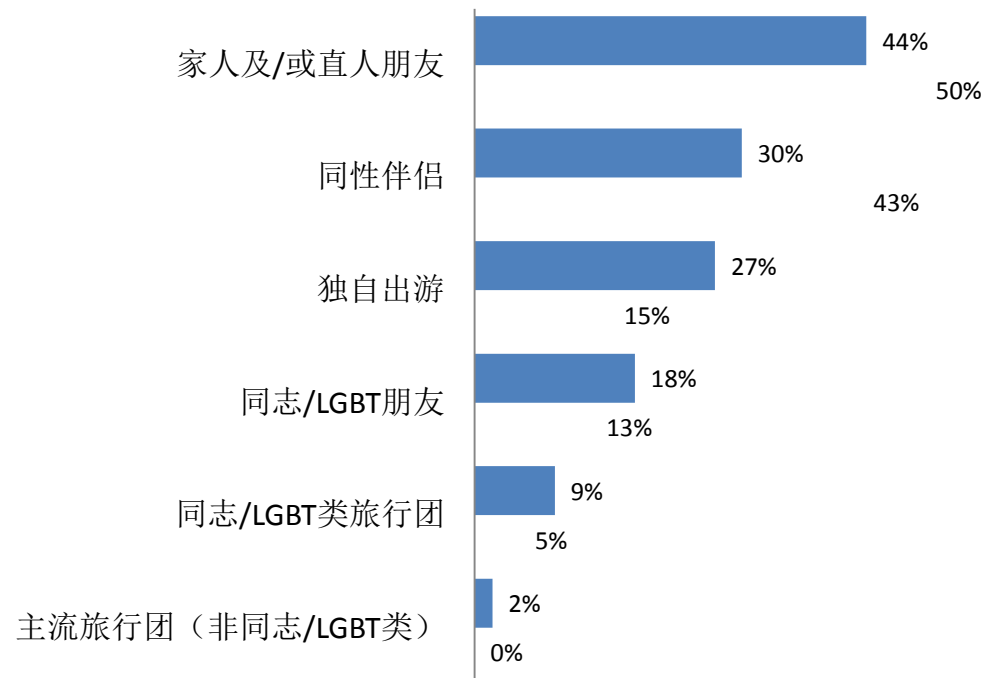
其他目的地	男同志/男双性恋	女同志/女双性恋
美国	42%	46%
澳大利亚	18%	16%
加拿大	10%	10%
新西兰	9%	8%
墨西哥	3%	3%
巴西	3%	1%
埃及	3%	1%
南非	3%	0%
秘鲁	2%	0%
加勒比海岛	1%	4%
阿根廷	1%	1%
南太平洋群岛（大溪地、斐济等）	1%	4%
其他目的地	36%	27%

Bases: 过去一年在国外（包括港澳台）休闲旅行n=1,712; 曾在其他国际目的地旅行(20%) n=340; 男同志/男双性恋 n=198; 女同志/女双性恋n=135

旅行伙伴： LGBT人群同各种各样的异性恋朋友、LGBT朋友、同性伴侣及家人一同出游。男同志/男双性恋有更高比例的独自出游经历，而女同志/女双性恋与同性伴侣出游的几率更高。

回忆您最近一次的境外旅行，您是和谁一同出游的？
(请选择所有适用选项)

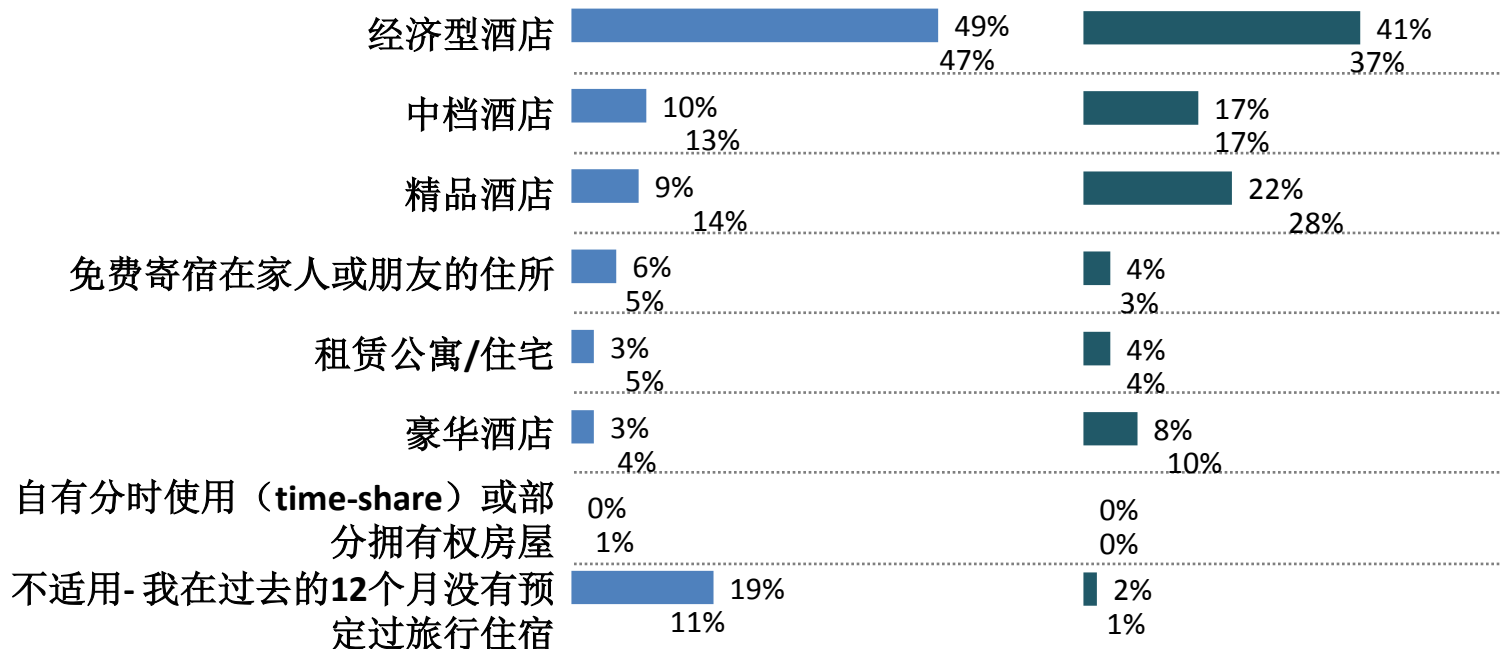
■ 男同志/男双性恋
■ 女同志/女双性恋



基数：男同志/男双性恋 n=882；女同志/女双性恋 n=761

休闲旅游住宿：虽然绝大多数人会选择经济型及中档酒店，和其他LGBT结伴出国（包括港澳台）旅行的受访者倾向于预定更多的精品及豪华酒店。

回忆您在过去12个月中的旅行，您最经常预定以下哪种类型的住宿？（选择最佳选项）



Bases: 男同志/男双性恋 n=4,871; 女同志/女双性恋 n=2,578; 独自或与非LGBT伙伴出国旅行 n=1,127; 与LGBT伙伴出国旅行 n=766

LGBT活动旅行：LGBT舞会/派对及骄傲活动对大多数群体来说都是最热门 LGBT旅行项目，而女同志/女双性恋对女同志和女性活动拥有更大的兴趣。

在过去的12个月中，您是否到其他城市（至少在当地酒店住宿一晚）参与以下同志/LGBT社群活动？（请选择所有适用选项）



男同志/
男双性恋

16%

曾为参加LGBT活动而旅行



LGBT舞会/派对	34%	拉拉/Lesbian社群活动	42%
LGBT主题活动	25%	LGBT舞会/派对	18%
LGBT骄傲活动	23%	女性活动（非女同志类）	17%
LGBT文化、艺术、 电影活动	22%	LGBT骄傲活动	16%
LGBT专业协会会议等活动	8%	LGBT文化、艺术、 电影活动	11%



女同志/
女双性恋

22%

曾为参加LGBT活动而旅行



在那些曾与同性伴侣出
国旅行的人群中



31%

在那些曾与LGBT朋友/旅
行团出国旅行的人群中



38%



曾为参加LGBT活动而旅行

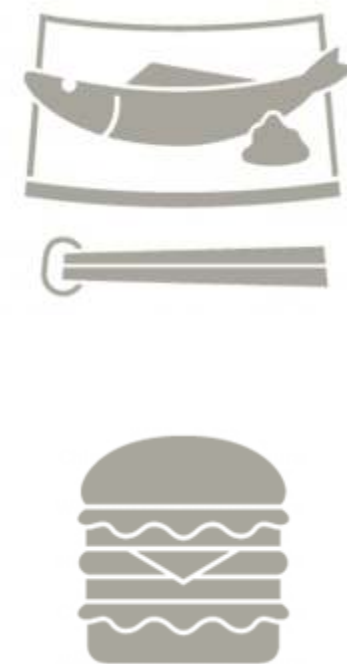
LGBT舞会/派对	32%	LGBT舞会/派对	42%
LGBT骄傲活动	23%	LGBT骄傲活动	30%
拉拉/Lesbian社群活动	15%	LGBT主题活动	24%
LGBT文化、艺术、 电影活动	15%	LGBT文化、艺术、 电影活动	20%
LGBT主题活动	13%	拉拉/Lesbian社群活动	13%

Bases: 男同志/男双性恋 n=4,694; 女同志/女双性恋 n=2,437; 曾与同性伴侣出国旅行 n=595; 曾与LGBT朋友/旅行团出国旅行 n=266

外出就餐： 女同志/女双性恋几乎在所有类别外出就餐的比例都超过男同志/男双性恋。中式及西式快餐连锁店为男女受访者每周最多消费的餐厅类型。

在过去的7天，您是否有在以下地点用餐？（请选择所有适用选项）

	 男同志/ 男双性恋	 女同志/ 女双性恋
中式快餐连锁店	57%	55%
西式快餐连锁店	44%	51%
独立品牌中式餐馆	34%	42%
中式精品餐馆连锁店	28%	36%
西式精品餐馆连锁店	18%	27%
独立品牌西式餐馆	17%	29%
以上都没有	22%	15%

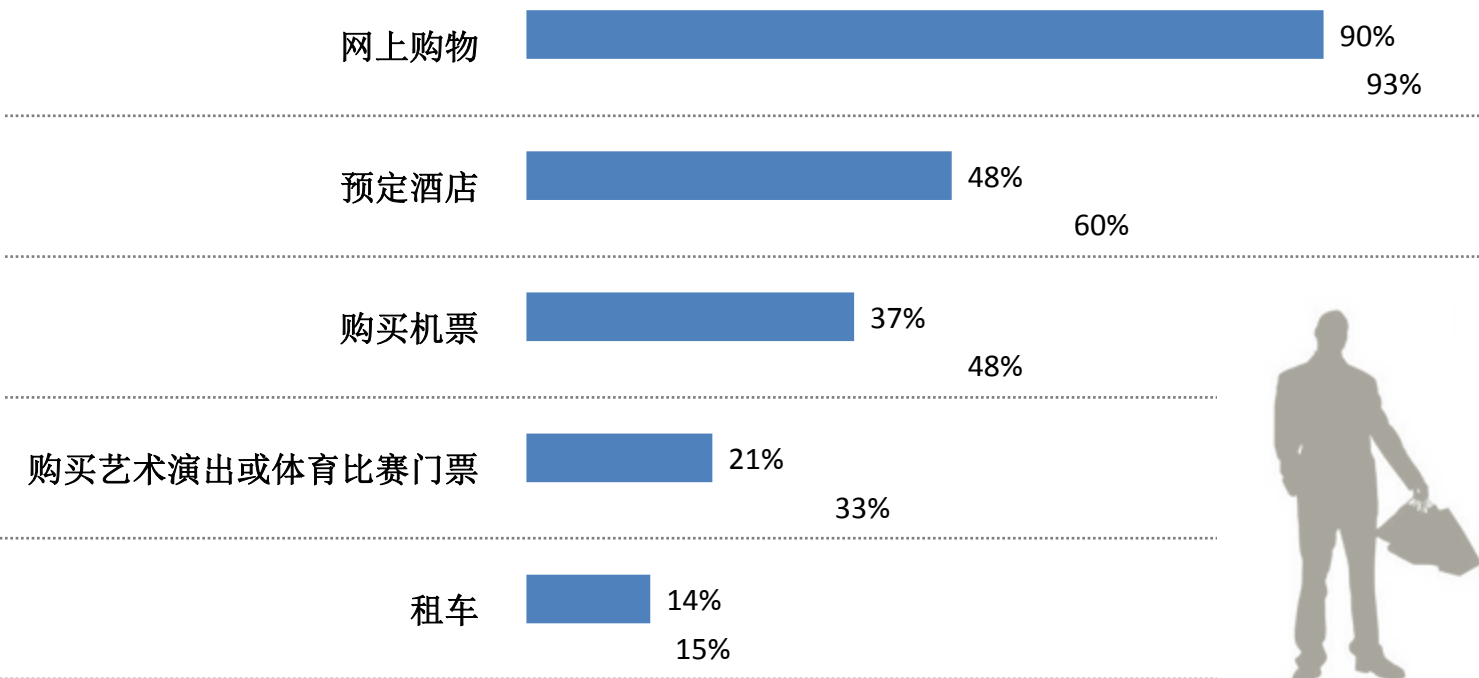


基数：男同志/男双性恋 n=4,878; 女同志/女双性恋 n=2,570

移动平台消费：90%的受访者在过去一年中曾使用移动设备购物。女同志/女双性恋使用移动设备在旅行及购买演出票方面消费的比例大于男同志/男双性恋。

在过去的一年中，您是否使用移动设备（手机、平板电脑等）来.....?
(请选择所有适用选项)

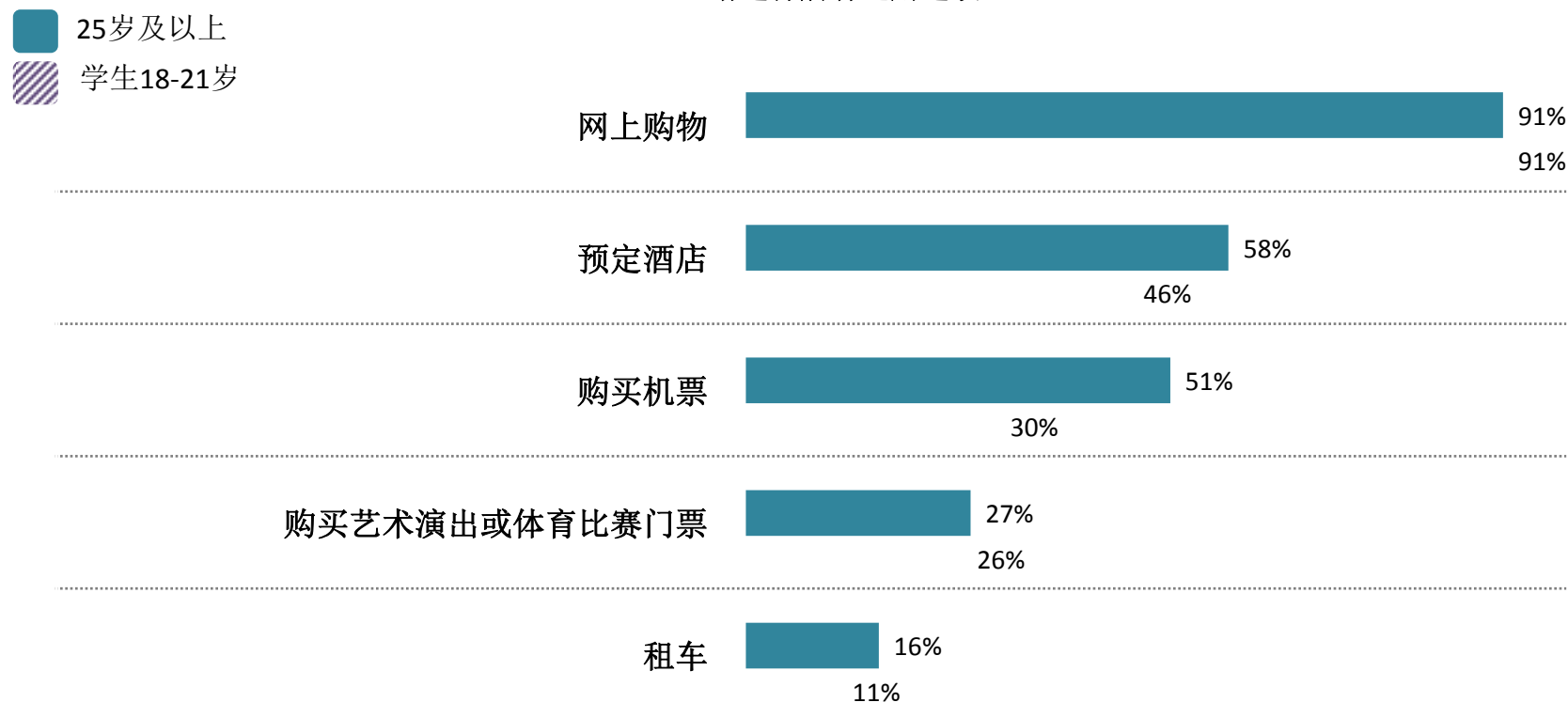
- 男同志/男双性恋
- ▨ 女同志/女双性恋



基数：男同志/男双性恋 n=4,894; 女同志/女双性恋 n=2,584

移动平台消费：使用移动设备购物在18-21岁学生及25岁及以上LGBT中都很流行，30%的学生曾使用移动设备订购飞机票并且有近半数曾预定酒店。不出意外，更高比例的25岁以上LGBT人群曾订购飞机票（51%）及酒店（58%）。

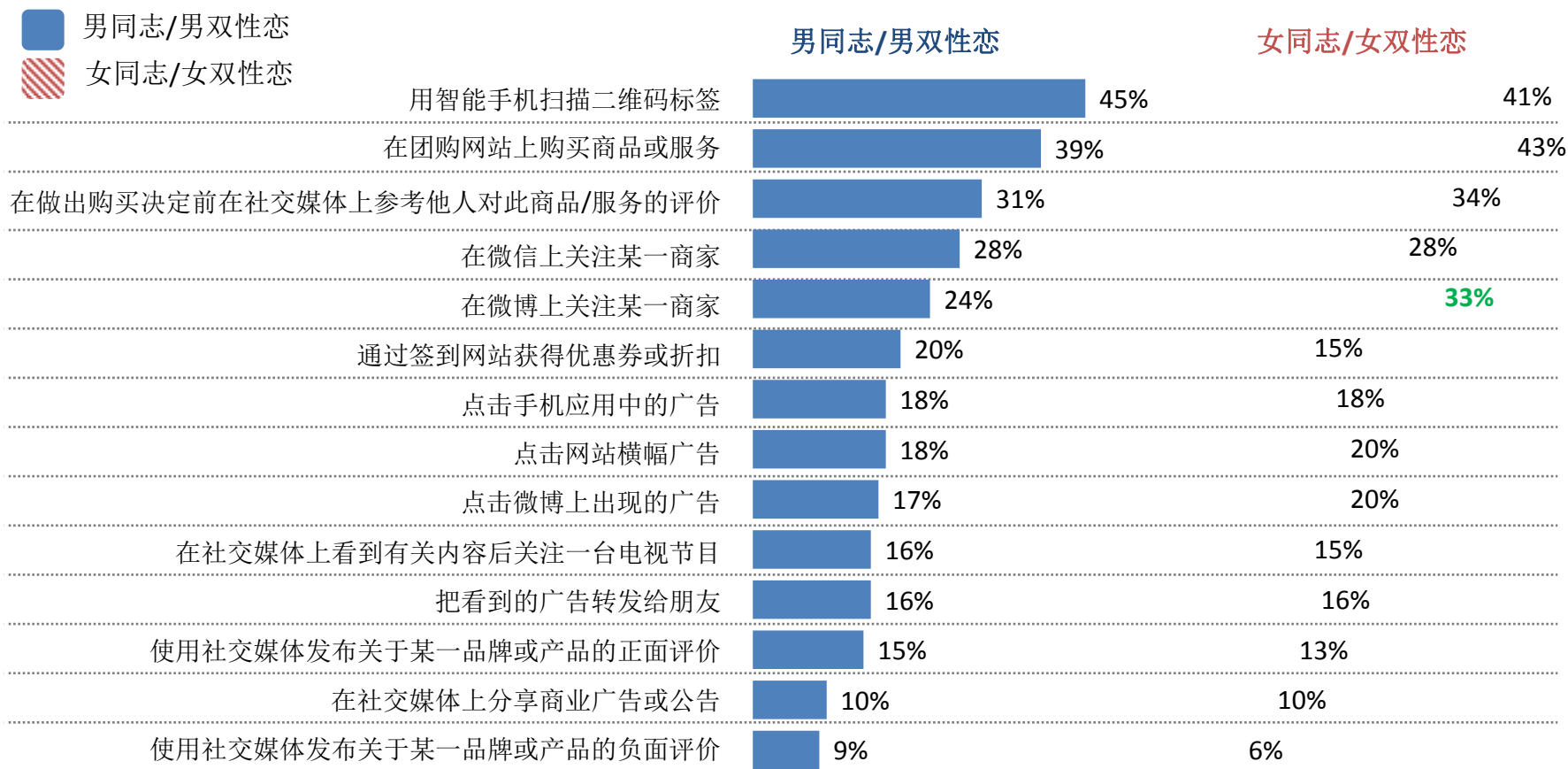
在过去的一年中，您是否使用移动设备（手机、平板电脑等）来.....?
(请选择所有适用选项)



基数：学生18-21岁 n=1,849; 25岁及以上 n=2,930

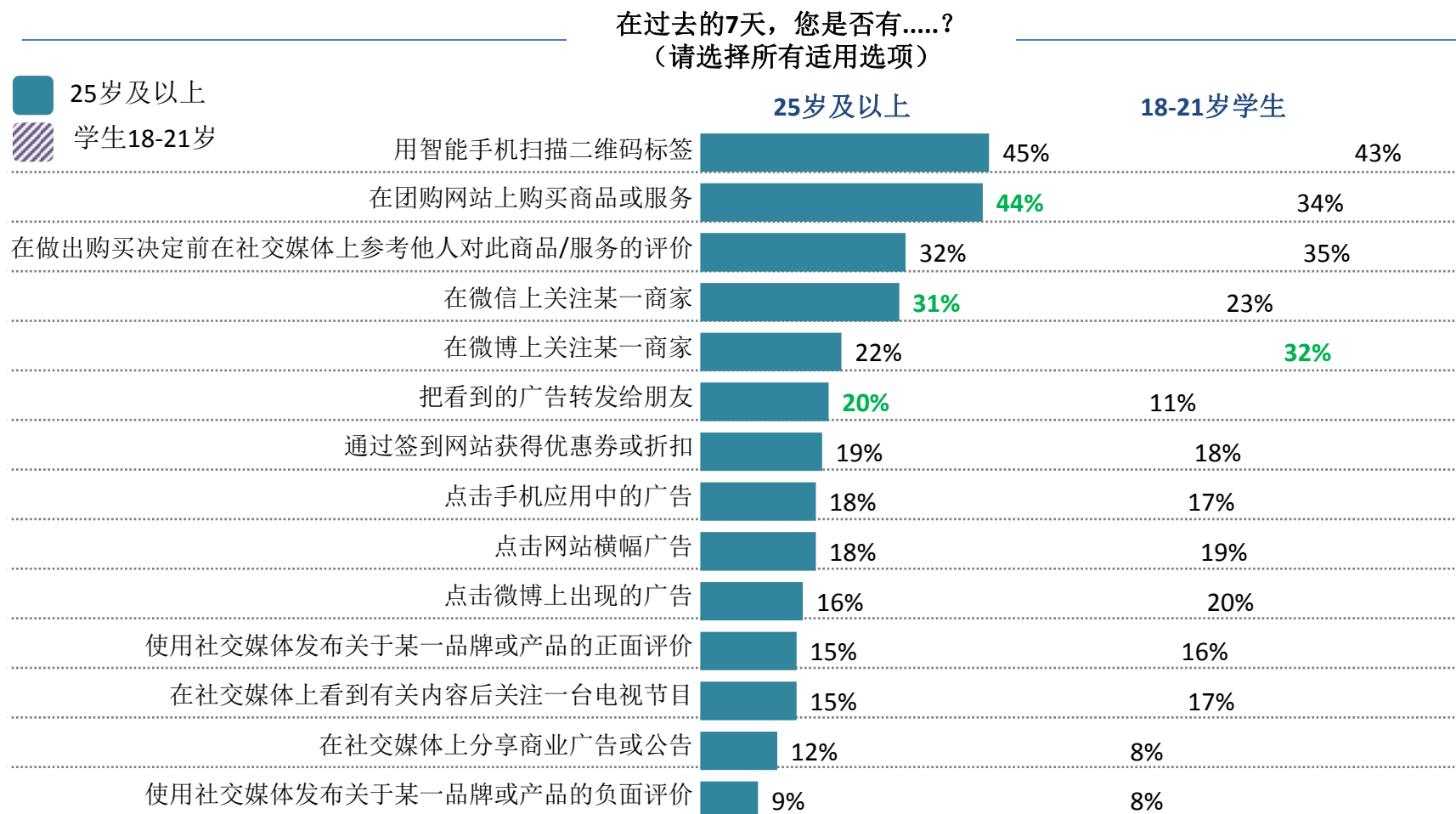
广告互动：LGBT们与多种广告形式都有近乎相同程度的互动。二维码标签、团购网站及社交媒体评论为男女受访者互动最多的广告形式。

在过去的7天，您是否有.....?
(请选择所有适用选项)



基数：男同志/男双性恋 n=4,579; 女同志/女双性恋 n=2,432



广告互动： 微博在18-21岁学生中更流行而微信更受25岁及以上LGBT的欢迎。二维码标签、团购网站及社交媒体评论仍为两个群体互动最多的广告形式。



Bases: 学生18-21岁 n=1,717; 25岁及以上 n=2,760

媒介消费：LGBT手机应用及LGBT网站/博客在所有群体中都比较普及，而更传统的媒介例如报纸、广播则很少受到关注。LGBT网络出版物及LGBT类网络电视节目的排名也比较低，这可能是由于此类媒介的可获得性有限。

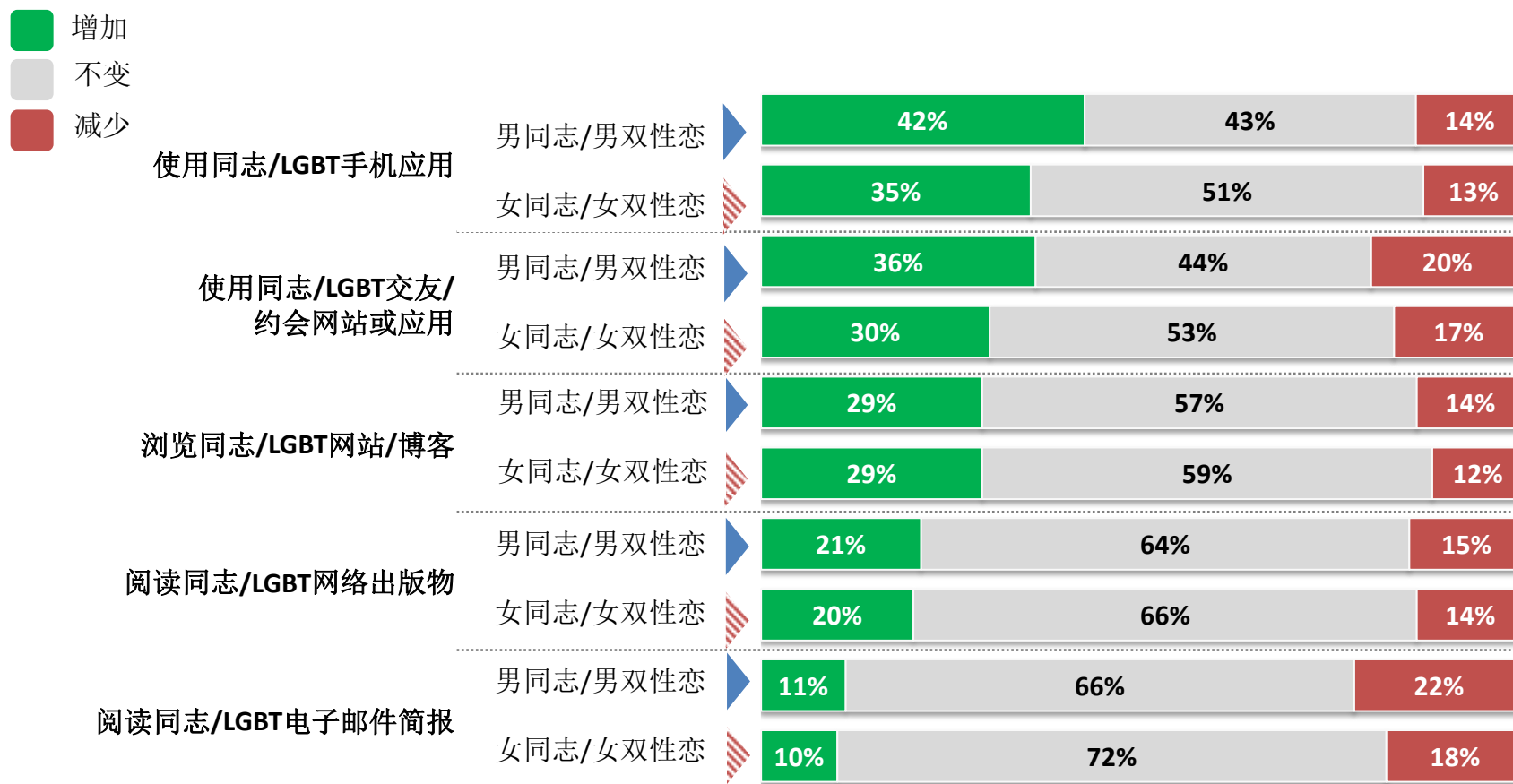
在过去的7天里，您是否有阅读、浏览、或收听过....？（请选择所有适用选项）

	 男同志/ 男双性恋	 女同志/ 女双性恋	18-21岁 学生	25岁 及以上
同志/LGBT手机应用	45%	36%	44%	41%
同志/LGBT网站/博客	44%	36%	42%	42%
电视节目	39%	42%	45%	40%
网络流式视频节目（电视、电影等）	39%	42%	42%	41%
主流网站/博客	36%	37%	37%	41%
同志/LGBT网络出版物	24%	13%	20%	21%
主流报纸	19%	15%	18%	20%
主流杂志	18%	19%	21%	18%
同志/LGBT类网络视频节目	16%	14%	15%	15%
主流广播节目	12%	13%	13%	14%
同志/LGBT广播节目（收音机或网络在线直播）	10%	17%	15%	11%
车载收音机	10%	15%	9%	16%
同志/LGBT电子邮件简报	7%	5%	5%	7%
主流电子邮件简报	6%	6%	5%	7%

基数：男同志/男双性恋 n=4,860；女同志/女双性恋 n=2,555；18-21岁学生 n=1,831；25岁及以上 n=2,906

媒介消费变化：在所有列出的LGBT媒介中，LGBT手机应用在过去12个月中使用习惯增长的比例最高。LGBT交友约会类网站/应用也有很高的增长率。

在过去的12个月，您阅读或使用以下同志/LGBT媒介的习惯是否有发生变化？

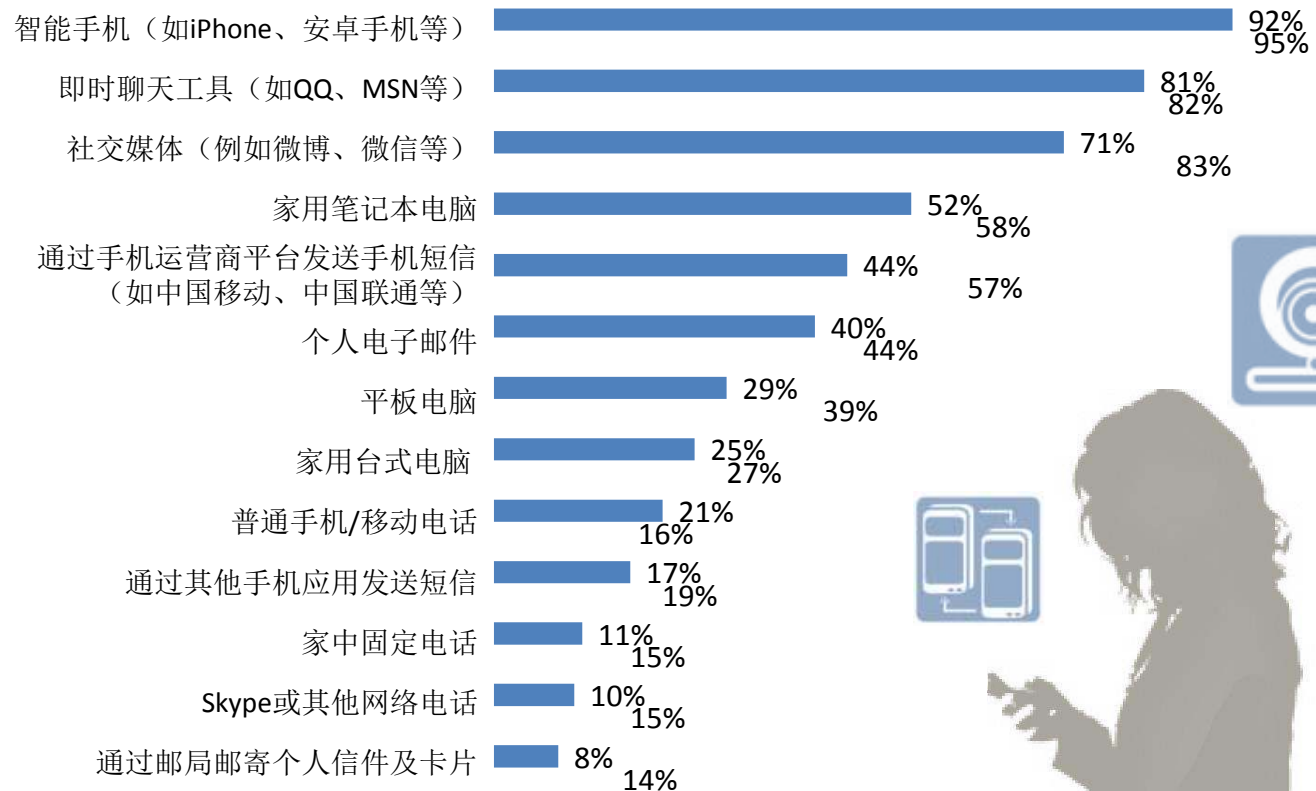


基数：男同志/男双性恋 n=3,871; 女同志/女双性恋 n=1,999

联络工具：即时聊天工具及综合性社交媒体如微博和微信已成为最流行的私人联络工具。

您是否拥有或者使用以下选项作为您的私人联络工具（非工作目的）？
（请选择所有适用选项）

- 男同志/男双性恋
- ▨ 女同志/女双性恋

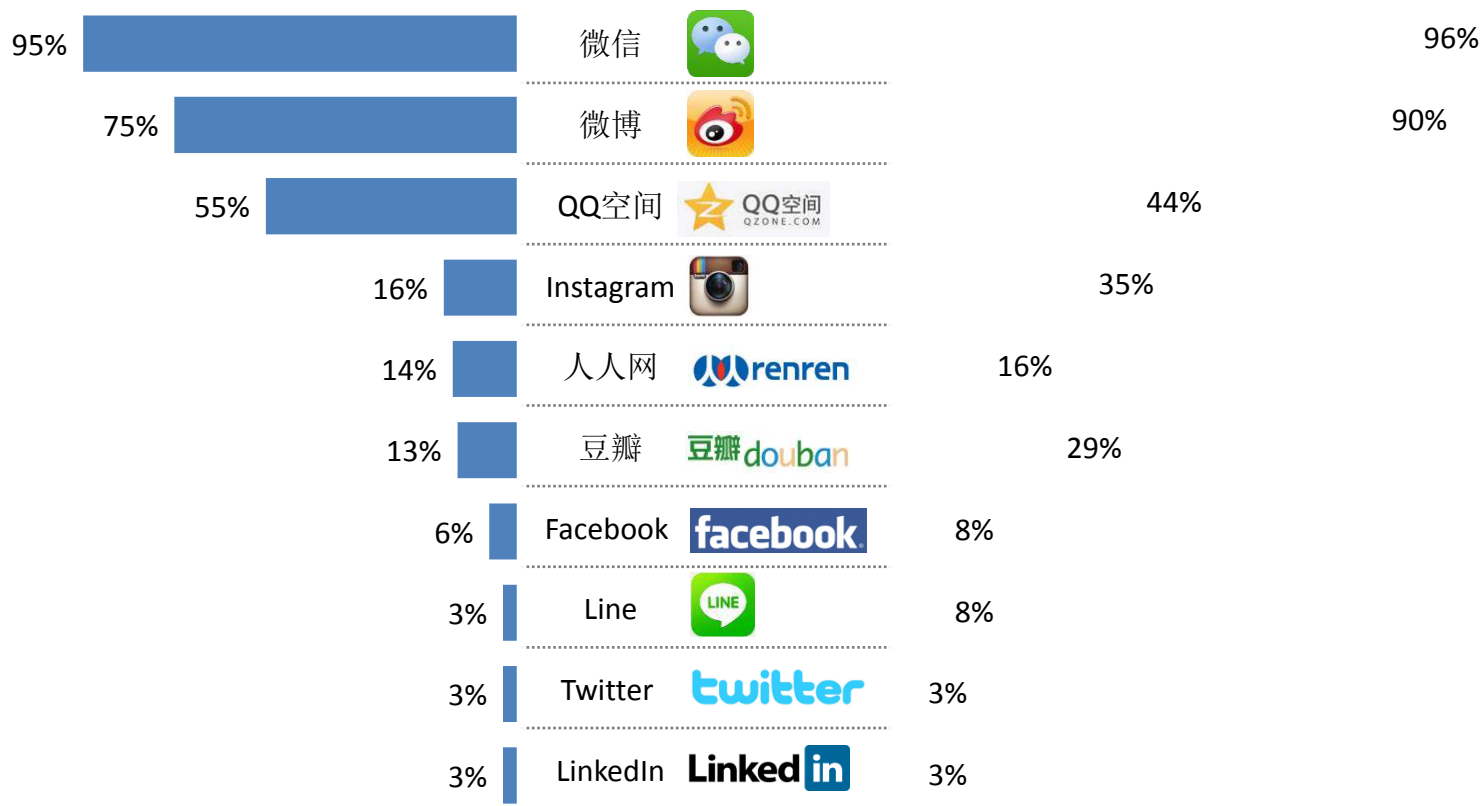


基数：男同志/男双性恋 n=4,901; 女同志/女双性恋 n=2,587

社交媒体：微信和微博为使用最广泛的非LGBT类社交媒体。

您若使用社交媒体作为您的私人联络工具，您经常使用以下哪些社交媒体？
(请选择您最经常使用的5种)

- 男同志/男双性恋
- 女同志/女双性恋

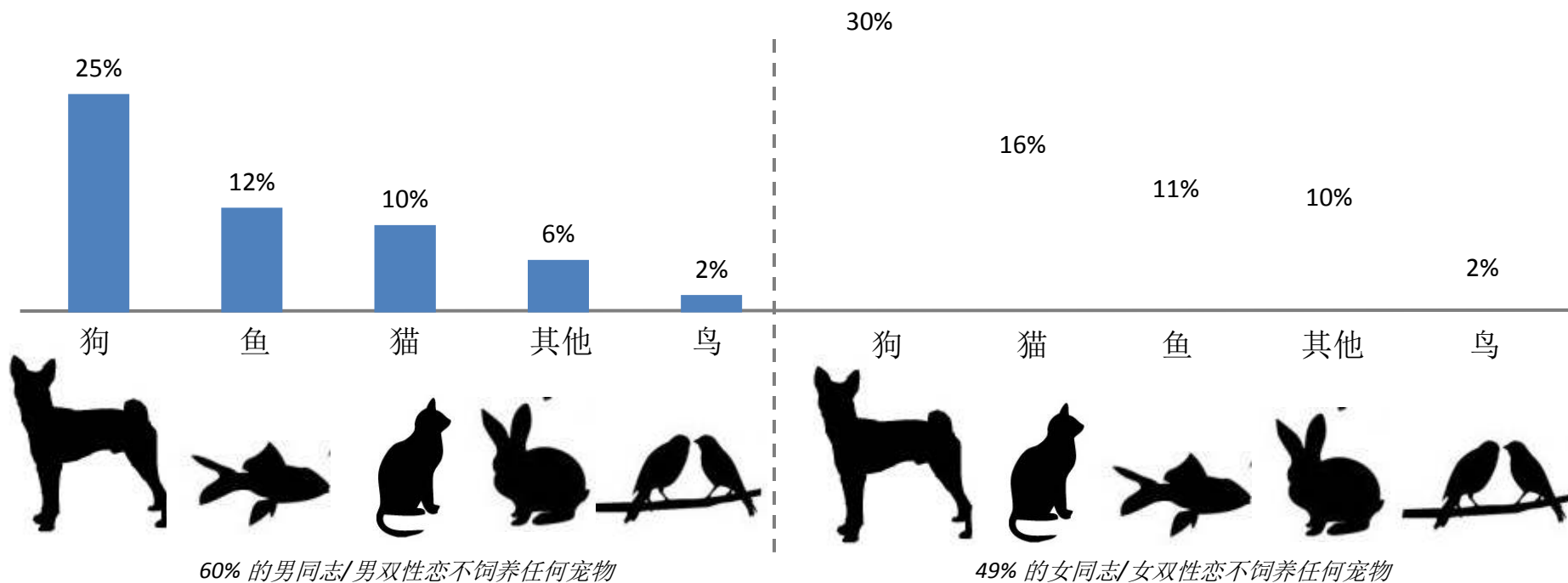


基数：男同志/男双性恋 n=3,498; 女同志/女双性恋 n=2,144

宠物： 相比于男同志/男双性恋，女同志/女双性恋更有可能饲养宠物。

您在家中饲养以下哪（些）种宠物？

- 男同志/男双性恋
- ▨ 女同志/女双性恋

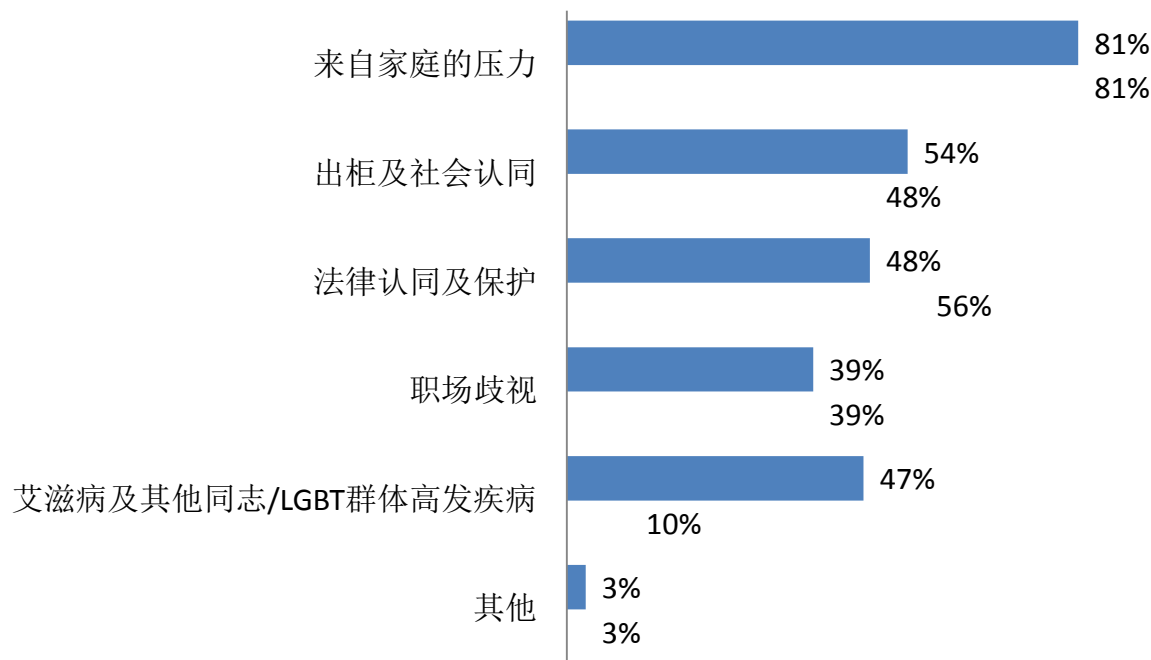


基数：男同志/男双性恋 n=4,874；女同志/女双性恋 n=2,574

LGBT困扰：来自家庭的压力为男女受访者最大的担心。男同性恋/男双性恋也对艾滋病及其他疾病感到担心。

作为同志/LGBT群体中的一员，您最大的担心有哪些？
(请选择所有适用选项)

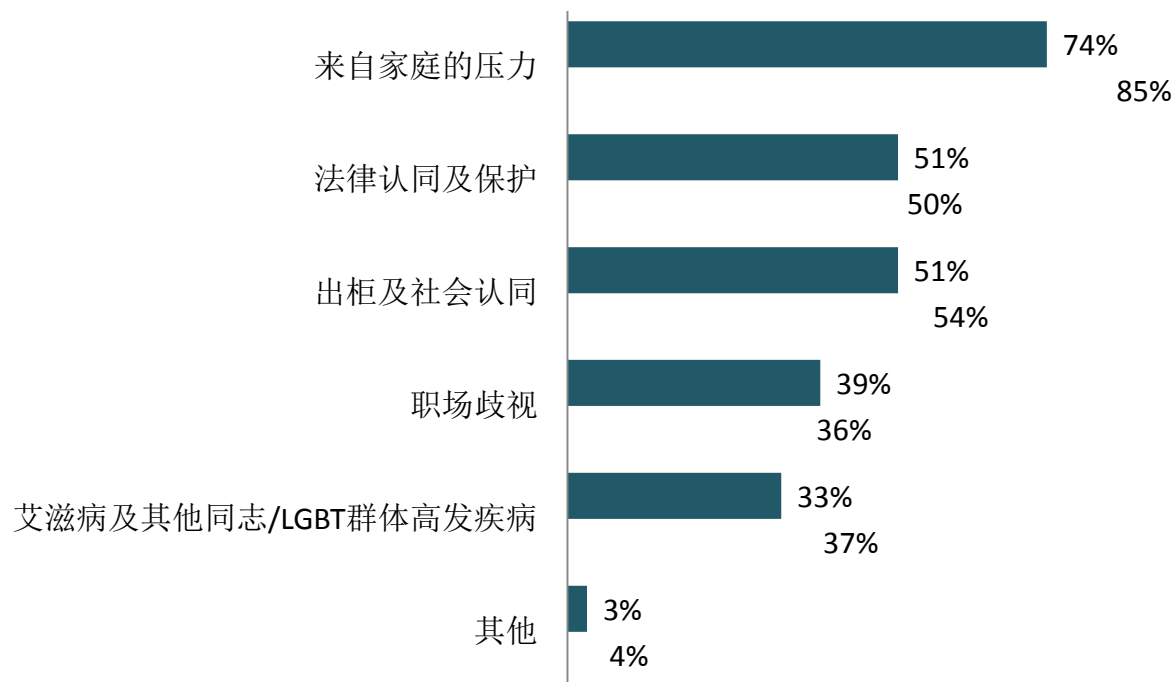
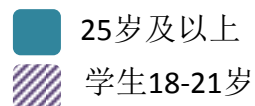
■ 男同志/男双性恋
■ 女同志/女双性恋



基数：男同志/男双性恋 n=4,890; 女同志/女双性恋 n=2,572

LGBT困扰：年轻学生的担忧与青年LGBT基本相同，但会感受到更多的来自家庭的压力。

作为同志/LGBT群体中的一员，您最大的担心有哪些？
(请选择所有适用选项)



基数：学生18-21岁 n=1,841; 25岁及以上 n=2,928

THANK YOU!

让我们帮助您更好的了解市场机会、增长
LGBT市场份额以及提高投资回报。



更多信息请联系:

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

The LGBT community is dynamic and diverse, reflecting the spectrum of the general population: From young to old, ethnicities, gender identities, relationship status, income, etc. Narrow marketing strategies viewed LGBT as one community, one market. However, with the sophistication of LGBT consumer research today, market leaders can identify the “segments” of the LGBT community best matched to their products and services. With our representative panel of over 70,000 LGBTs who actively engage with LGBT media, events and organizations, Community Marketing & Insights can identify and deliver the best-matched panel for your research initiative and marketing goals.

Community Marketing, Inc. (CMI) is an NGLCC-Certified LGBT-Owned Business Enterprise. We’ve been helping a wide variety of industry leaders master the subtleties of this market **since 1992**. Our unique and specialized services are based on 20+ years of experience and industry leading case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), strategic consulting and corporate training.

Whether your organization is just learning about the market, or is updating its strategy, **Community Marketing & Insights** can accelerate your plans, reduce your risks and deliver *measurable* results. CMI’s proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing & Insights has earned its position as the global leader in LGBT market research and development. Through the company’s tireless efforts, “doors have opened” around the world for the spectrum of LGBT consumers. We have helped grow LGBT market recognition through research, media relations and education; and have brought opportunities to many of the world’s leading marketers.

Community Marketing & Insights projects include these and many other market leaders:

- ABSOLUT Vodka (Pernod Ricard)
- Aetna Insurance
- American Cancer Society
- Chicago History Museum
- Credit Suisse
- E. & J. Gallo Winery
- Esurance (an Allstate Company)
- Gilead Pharmaceuticals
- Hawaiian Airlines
- Hyatt Hotels & Resorts
- Japan National Tourism Organization
- Kaiser Family Foundation
- Kimpton Hotels & Restaurants
- Las Vegas CVA
- Merz Radiesse
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- OraSure Technologies
- Prudential Financial
- Tourism Office of Spain
- Target Brands
- U.S. Government: Census Bureau and HUD (Housing & Urban Development)
- Wells Fargo Bank

And many more...

CMI'S LGBT

CONSUMER RESEARCH PANEL 2014-15

DID YOU KNOW...?

The LGBT community is dynamic and diverse, reflecting the spectrum of the general population: From young to old, ethnicities, gender identities, relationship status, income, etc. Narrow marketing strategies viewed LGBT as one community, one market. However, with the sophistication of LGBT consumer research today, market leaders can identify the "segments" of the LGBT community best matched to their products and services. With our representative panel of over 70,000 LGBTs who actively engage with LGBT media, events and organizations, Community Marketing & Insights can identify and deliver the best-matched panel for your research initiative and marketing goals.

CMI'S LGBT CONSUMER PANEL: WHAT MAKES IT UNIQUE?

- **Accurate, targeted market intelligence**

Utilizing quantitative and qualitative market research methodologies, Community Marketing & Insights helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

- **The largest, most representative panel**

With over 20 years in business, Community Marketing & Insights has developed a research panel of more than 70,000 LGBT consumers. We've partnered with media outlets and LGBT-oriented organizations and events throughout the country and around the world to recruit a qualified panel that is geographically representative of the LGBT population.

- **Candid responses, honest feedback**

As an LGBT-owned and -operated firm, we've established trust with our panelists. We speak their language and know how to communicate effectively with them. As a result, our panelists are willing to talk with us frankly and frequently, even about sensitive issues.

- **Community Marketing & Insights experience & expertise**

Since 1992, Community Marketing & Insights has provided market research, corporate training and marketing planning services to a wide variety of clients. We've provided LGBT consumer intelligence to numerous market leaders including Wells Fargo Bank, Target Brands, Prudential, Johnson & Johnson, Aetna, ABSOLUT Vodka, MillerCoors Brewing Co., Japan National Tourism Organization, Tourism Office of Spain, E&J Gallo Wineries, OraSure Technologies, Chicago History Museum, Tourism Toronto, MetLife, Hyatt Hotels & Resorts, and many other companies, as well as the American Cancer Society, Kaiser Family Foundation, IFAW, UPenn, CUNY, and the U.S. Government (Census Bureau and H.U.D.).

We also present public and custom onsite educational seminars and workshops. Community Marketing & Insights has produced or presented at LGBT marketing symposia on six continents.

Learn more on our website, www.communitymarketinginc.com



SAMPLE DEMOGRAPHICS OF USA LGBT PANELISTS

48 MEDIAN AGE

41% SINGLE/NOT IN A RELATIONSHIP
19% LEGALLY MARRIED
5% CIVIL UNION OR REGISTERED DOMESTIC PARTNER

65% COLLEGE GRADUATES INCL. BACHELORS+
75% ARE EMPLOYED
57% HHI >\$50K

5% PURCHASED A HOME IN THE PAST 12 MONTHS
8% PLAN TO PURCHASE A HOME IN THE NEXT 12 MONTHS
39% PURCHASED A MAJOR VACATION (5 NIGHTS+) IN THE PAST 12 MONTHS
46% PLAN TO PURCHASE A MAJOR VACATION (5 NIGHTS+) IN THE NEXT 12 MONTHS

44% DRINK WINE WEEKLY
42% DRINK BEER WEEKLY
49% DRINK SPIRITS OR COCKTAILS WEEKLY

PAST 12 MO. PURCHASES
17% AUTOMOBILE
15% FURNITURE
60% PERFORMING ARTS TICKETS
10% MAJOR KITCHEN APPLIANCES (\$500+)
24% LGBT FUNDRAISING GALA TICKETS

52% "LIKED" A BUSINESS ON FACEBOOK
61% READ LGBT BLOGS / WEBSITES
31% CLICKED ON A FACEBOOK AD
42% CLICKED ON A MOBILE APP AD
22% USE LGBT MOBILE APPS

66% CARE FOR PETS

SHARED OR RETWEETED A COMMERCIAL AD OR ANNOUNCEMENT 14%
TWEETED DURING A TELEVISION SHOW USING A RECOMMENDED #HASHTAG 9%
TUNED INTO A TELEVISION SHOW AFTER SEEING RELATED TWEETS 9%
USED SOCIAL MEDIA TO VOICE A POSITIVE EXPERIENCE WITH A BRAND OR PRODUCT 34%
USED SOCIAL MEDIA TO VOICE A NEGATIVE EXPERIENCE WITH A BRAND OR PRODUCT 24%

AND MORE!

LGBT Market Research:

There is a difference!

Market research studies and resulting statistics are meant to help marketers understand the LGBT communities, and influence educated decisions about their strategies and tactics. However, *not all research is the same*. **Community Marketing & Insights** methodologies and experience are distinct from those of others when considering approaches, respondent panels—and ultimately—the validity and utility of sought-after results.

WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has developed our proprietary consumer panel over the past 20+ years by circulating field surveys at leading LGBT events, and by partnering with LGBT organizations and media across the USA, Canada, the UK, and around the world. These partners distribute our survey invitations via print ads, web banners, email broadcasts and social networks to their memberships and/or readers. The resulting panels are highly representative of LGBT consumers who interact with the LGBT community and media. *This is important:* If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations. CMI research is trusted by—and frequently quoted in—the *New York Times*, *USA Today*, the *Wall Street Journal*, *Forbes*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *Ad Week*, NPR, CBS News, Associated Press, etc.

Other providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate that they are gay or lesbian in the context of a survey. This approach, attempting to “represent the gay community at large,” may be appropriate for direction in sociological or academic studies, but not for developing clear, representative advertising or marketing related strategies. Other researchers use lists from one or two LGBT publishers, which may skew results. For marketers desiring valid LGBT consumer insights about products, services, advertising creative and marketing strategies, these panel development approaches are not likely to yield LGBT community members who are interacting with the media where you are placing ads.

IN RESEARCH, SIZE DOES MATTER.

CMI has conducted over a hundred LGBT-dedicated research studies since the early '90s, covering a wide variety of topics, industries and interests. Through our work, we both observe and influence the trends of this market. Size does matter in the case of research. Our research panel has grown to over 70,000 qualified LGBT consumers, the largest of its kind, by far. Our 6th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 148 countries, making it the largest such study in history. We leverage our long history / experience / expertise for your benefit, and fine-tune our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of the panel, or “reinvent the wheel” at your expense. One cannot fathom the diversity and complexities within LGBT (see below) on a small sample. And with small samples, you lose the opportunity to derive statistically-significant cross tabs on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a 28 year old lesbian in Seattle has the same purchasing motivations and behaviors as a 67 year old gay man in Atlanta? Generalities and sweeping statements about “the gay market” based on comparatively small samples can distort the results of research findings, potentially wasting your investment of time and resources.

DIVERSITY: THERE IS NO “LGBT MARKET”

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

General surveys on “the gay market” are likely to only scratch the surface of the diversity and varieties of opportunities marketers can enjoy if properly explored and understood.

continues...

TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE

Since 1994, CMI has taken pride in operating the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. *Quantitative* (data) research is one important side of a coin, but only tells half of the story. The other side of a comprehensive research initiative involves *qualitative* research, most notably derived from focus groups. We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany and Australia, as well as many secondary markets. We've found that the same creative, tested in different regions, often yields substantially differing results. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns? CMI is the *only* LGBT-dedicated research provider that produces and facilitates LGBT focus group studies and other *qualitative* research options. We have developed and reported on focus groups covering a wide variety of topics, plus we have operated telephone interviews, field surveys, advisory board series and multi-year customer satisfaction survey projects which can round out a comprehensive market intelligence plan.

Producing only online surveys, other research companies are telling 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 are only uncovered in qualitative research... extremely important considerations that averages and extrapolated assumptions based only on survey statistics are likely to miss.

WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We do all of our research in-house, because nobody knows this market segment as well as we do. We never sell or rep another company's services, nor will we outsource your project to a 3rd party.

Some firms work as reps of research companies, or outsource clients' projects, and report on the results of the 3rd party's work. But without being intimately involved in every aspect of the project, from discussing the client's goals and designing the study, to building the survey, implementing it and writing the report, and without engaging directly with consumers in focus groups, it is difficult to gain the insights that can only come from CMI's hands-on LGBT research specialization spanning nearly two decades.

TRUSTED

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

PROUDLY LGBT-OWNED AND -OPERATED

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

COMMUNITY CITIZENSHIP

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

VALUE

You'd think that with this kind of specialization and experience, you'd be investing considerably more for **Community Marketing & Insights** services than for research from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 60+ years of dedicated LGBT research among the CMI team, that we can actually keep your costs low. We are not spending your money to locate qualified survey or focus group participants, nor are we spending our time (or your money) trying to source comparative data or case studies. We've done all that over the past 20 years for your benefit. And we are not running a large operation that juggles many accounts and projects of differing scope and focus. CMI's client dedication and market specialization delivers you superior intelligence at a fraction of the cost of other firms.