



CMI Community Marketing & Insights
Community Marketing, Inc.



1st China LGBT Community Survey[®]

In partnership with



ABOUT US

OVER 20 YEARS OF LGBT INSIGHTS



- › Community Marketing & Insights (CMI) has been conducting LGBT consumer research for over 20 years. Our practice includes online surveys, telephone interviews, intercepts, focus groups (on-site and online), and advisory boards in North America and Europe. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › Key findings have been published in the New York Times, Washington Post, Chicago Tribune, Los Angeles Times, Wall Street Journal, Forbes, USA Today, Miami Herald, CBS News, NPR, Associated Press and many other international, national and regional media.
- › CMI's research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: Prudential, Wells Fargo Bank, Aetna, Target Brands, SunTrust Bank, Johnson & Johnson, WNBA, OraSure, Credit Suisse, Hologic, Esurance, Merz Radiessse, Absolut Vodka, NYC & Co., Visit Philadelphia, Las Vegas CVA, Hyatt Hotels Corp., Tourism Toronto, Tourism Office of Spain, Hawaiian Airlines, United States Census Bureau, American Cancer Society, Kaiser Family Foundation and numerous other corporations and organizations across North America and around the world.





Shanghai LGBT Professionals, as a non-profit network for gay and lesbian employees and platform for dialogue and cooperation with companies across China on LGBT inclusion, is honored to have brought together an unprecedented coalition of 20 Chinese LGBT groups, media, and organizations to conduct this survey.

As organizer of the 1st China Pink Market Conference, in partnership with Community Marketing & Insights, Dan Lan / Blued, and the L, I'm proud each of our 20 diverse partners contributed at least 100 survey responses. Your leadership has made history.

Sincerely,
Steven Paul Bielinski
Founder, Shanghai LGBT Professionals

*Every year, Community Marketing & Insights produces custom
LGBT research projects for brands like...*



E&J Gallo Winery



RESEARCH DESIGN

OVER 20 YEARS OF LGBT INSIGHTS



Who Did We Target?

- › LGBTs 18 and above residing in China.
- › Respondents were recruited from CMI's proprietary research panel and through 20 partner organizations.
- › Partners include: *Dan Lan/Blued, the L – lesbian social app, PFLAG China, LesTalk, Chengdu Tongle Health Counseling Service Center, Shanghai Nvai, Chinese Gay-Straight Alliance, Tontou, GJUnion, Sunshine Michu, Shanghai PRIDE, Togayther, Beijing Gender Health Education Institute, ZHITONG, QueerLaLa Times, OUTER, Common Language, Chongqing TongXin Workgroup, and YouGov.*



What Was the Methodology?

- › This comprehensive online survey on LGBT consumers was mobile optimized made available through an email invitation to survey panelists, as well as on the websites, email lists and social media of our 20 partners.
- › Importantly, our sample reflects the readership/membership of this broad range of LGBT focused media outlets, organizations and events. This means that the results summarized here are highly representative of consumers who are interacting with the LGBT community.



Executive Summary

- Those who are more “out” and involved in China’s emerging LGBT community tend to be young adults. Companies outreaching to China’s LGBT community should use imagery, language and media in their marketing that appeals to young adult demographic.
- While more men than women responded the survey, lesbians and bisexual women indicated that they are far more likely to be out to friends, family and colleagues and far less likely to indicate they were completely closeted. Both the male and female markets represent significant opportunity. Effectively speaking to both men and women will be important for companies outreaching to China’s LGBT community.
- 53% of respondents indicate that corporations that support LGBT political causes and laws have the biggest impact on influencing their purchasing decisions. Because of the absence of legal protection for LGBTs both in life and at workplace, LGBT-related policies are a big concern for LGBT people in China. When marketing to LGBTs, companies should show support to policy related causes and communicate that support through LGBT organizations, events and especially mainstream media when possible. This corporate-led approach has been very successful in the USA, where changes in corporate policy have led to social, political and economic advances for LGBTs, far in advance of government acknowledgement or recognition.
- While LGBTs in China work in a wide variety of industries, the most popular industries are marketing, financial services, technology, manufacturing, and education. Workplace equality is of high interest to LGBTs in China. Implementing internal employment non-discrimination policies will help companies attract the best of LGBT talent; these employees often become advocates for their employers, which ultimately increases sales.



Executive Summary

- 80% of respondents indicate that pressure from their families is their biggest concern, especially for young students (85%). Family plays a very important role for Chinese LGBTs. Companies that convey a message about family support for LGBTs can create an especially important emotional bond to LGBT consumers.
- Young LGBTs in China are mobile-obsessed: 71% of all participants--and 76% of students between 18 and 21--purchased smartphones in the past 12 months. 91% of respondents used a mobile device to shop online in the past year. Because most Chinese LGBTs are communicating via mobile devices, companies reaching out to them should be sure that the mobile experience is welcoming to LGBTs. This may include adding same-sex couple imagery in mobile-optimized websites and apps, as well as making sure that the terminology is more gender-neutral (e.g. not referring to "he and she" when referring to couples).
- Instant messaging and social media have become the largest personal communication tools for Chinese LGBTs. 95% and 81% of respondents rate Wechat and Weibo as the top social media platforms they use, making these two the leaders among non-LGBT specific social media sites. Students between 18 and 21 have more interaction with Weibo while participants of 25 and above are more likely to interact with Wechat. Companies should increase social media marketing when reaching out to young Chinese LGBTs, and make sure that content is LGBT inclusive and supportive.
- QR codes, deal sites and social media reviews draw the most weekly ad interactions. The research points to a gender gap in preferred media. Gay and bisexual men engage more with LGBT apps (45%) and LGBT websites/blogs (44%) while lesbian and bisexual women interact with more network/cable TV (42%) and online streaming video (42%).



Executive Summary

- The research supports that companies advertising on LGBT mobile apps and LGBT websites/blogs will provide a large number of impressions to the LGBT community living in China.
- Lesbian and bisexual women travel more than gay and bisexual men both domestically and internationally. 68% of lesbian and bisexual women and 53% of gay and bisexual men took at least one domestic leisure trip or vacation in the past 12 months. Top 5 domestic destinations for Chinese LGBTs are Beijing, Shanghai, Hangzhou, Chengdu, and Xiamen. For decades, travel has been a huge part of the international LGBT economy, and this appears to be parallel in China. Travel and hospitality companies should lead the way in LGBT business and commerce with specific communications and travel products.
- 49% of lesbians and bisexual women and 34% of gay and bisexual men surveyed indicated that they have a current passport, and this number goes up to 54% for LGBTs age 25 and above. In the past year, 30% of lesbian and bisexual women and 18% of gay and bisexual men took at least one leisure trip or vacation in a foreign country or Hong Kong, Macau, and Taiwan. Other popular Asian destinations included Thailand, South Korea, Japan, and Malaysia. Visits to the United States and European countries were also fairly popular among LGBTs living in China. Marketers should partner with the tourism offices and companies representing LGBT-friendly destinations to cooperatively promote their products to Chinese LGBT consumers.
- LGBTs travel with a variety of straight and LGBT friends, partners and family. While budget and mid-range hotels topped the list of leisure accommodations, those traveling with other LGBTs internationally indicated more boutique and luxury hotel bookings. Because the LGBT community spans the spectrum of income, a variety of lodging options should be promoted to reach all segments and levels of traveler.



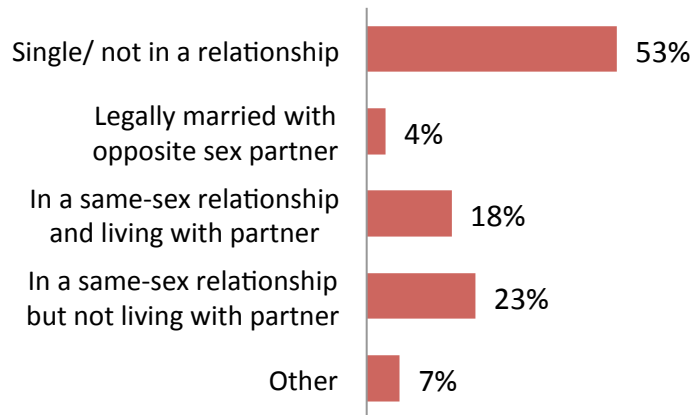
Executive Summary

- 18% of Chinese LGBTs indicated that they have traveled to participate in an LGBT community event in the past 12 months. Those who travel with same sex partners or LGBT friends internationally are more likely to attend LGBT events. The most popular LGBT events are circuit party/dance event and pride events. Destinations in China should work with LGBT event planners to help market the destination as LGBT welcoming with LGBT activities of interest.

RESPONDENT PROFILE

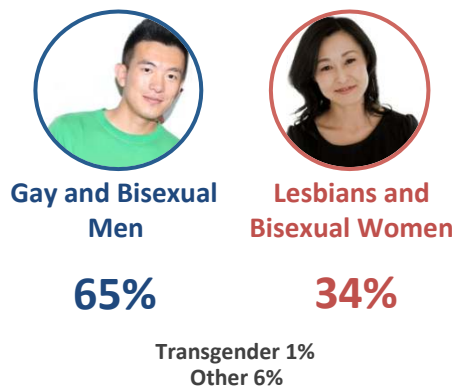


RELATIONSHIP STATUS



Total exceeds 100% as respondents were able to check multiple identities.

IDENTIFIES AS...

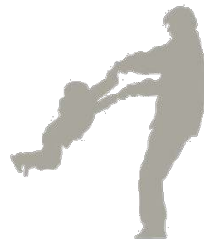


Total exceeds 100% as respondents were able to check multiple identities.

EDUCATION LEVELS

Bachelors Degree	42%
Associates Degree or Professional Certification	26%
Master's Degree or Higher	9%
High School/Secondary School	16%

CHILDREN UNDER 18

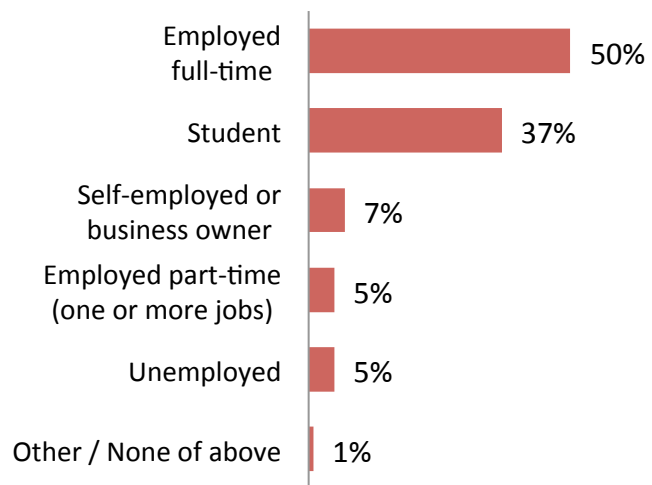


Bases: All LGBT n=7,577

RESPONDENT PROFILE



EMPLOYMENT STATUS



TOP PROVINCES/CITIES REFERRED

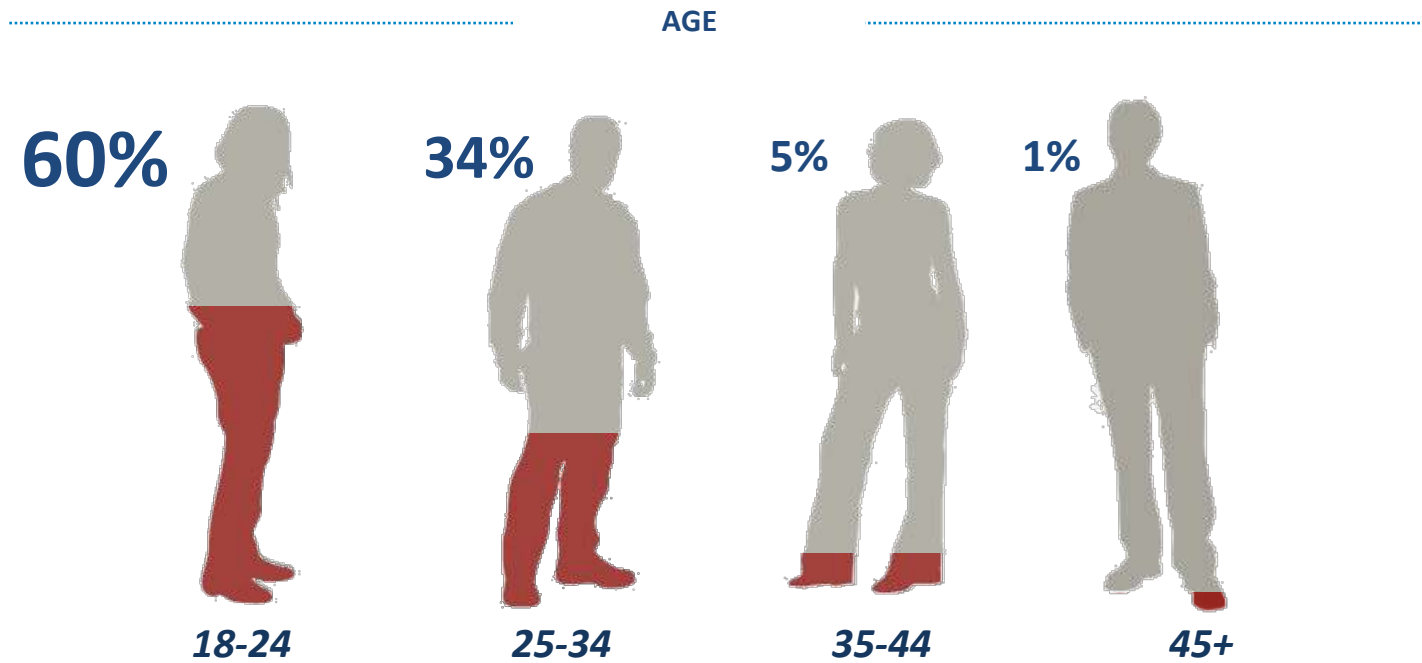


Bases: All LGBT n=7,577

 **RESPONDENT PROFILE**



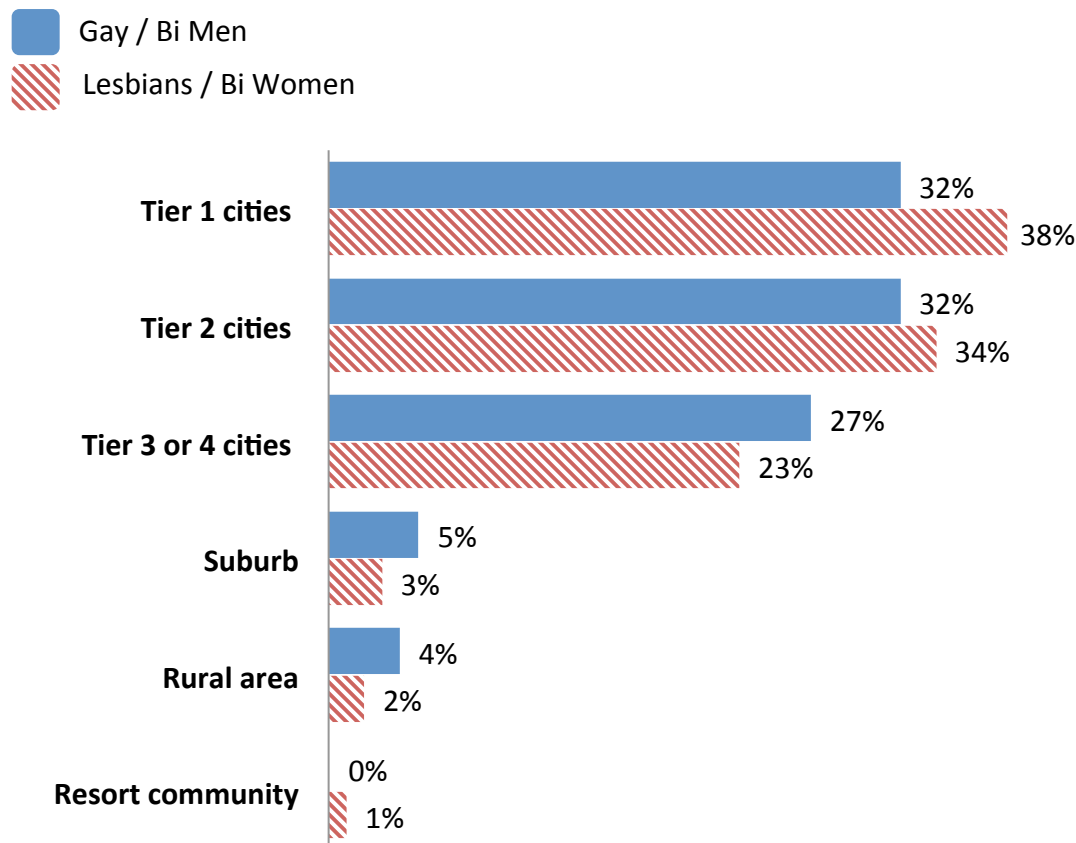
Age of Participants: Of special note is the age of the participants. Unlike LGBT profiles in other countries, the China LGBT survey attracted a very young demographic with a median age of 23. Those who are more “out” and involved in the emerging LGBT community in China tend to be young adults.



Bases: All LGBT n=7,577

Living Environment: Residence is relatively equal across tier 1, tier 2 and tier 3 cities. But of particular note is the prominence of LGBTs preferring to live in larger cities.

What type of environment best describes the place in which you live?



You said that you live in a Tier 1 city.
Do you have a desire to move out of the Tier 1 city and into a small city, the suburbs or a rural community?



Gay / Bi Men



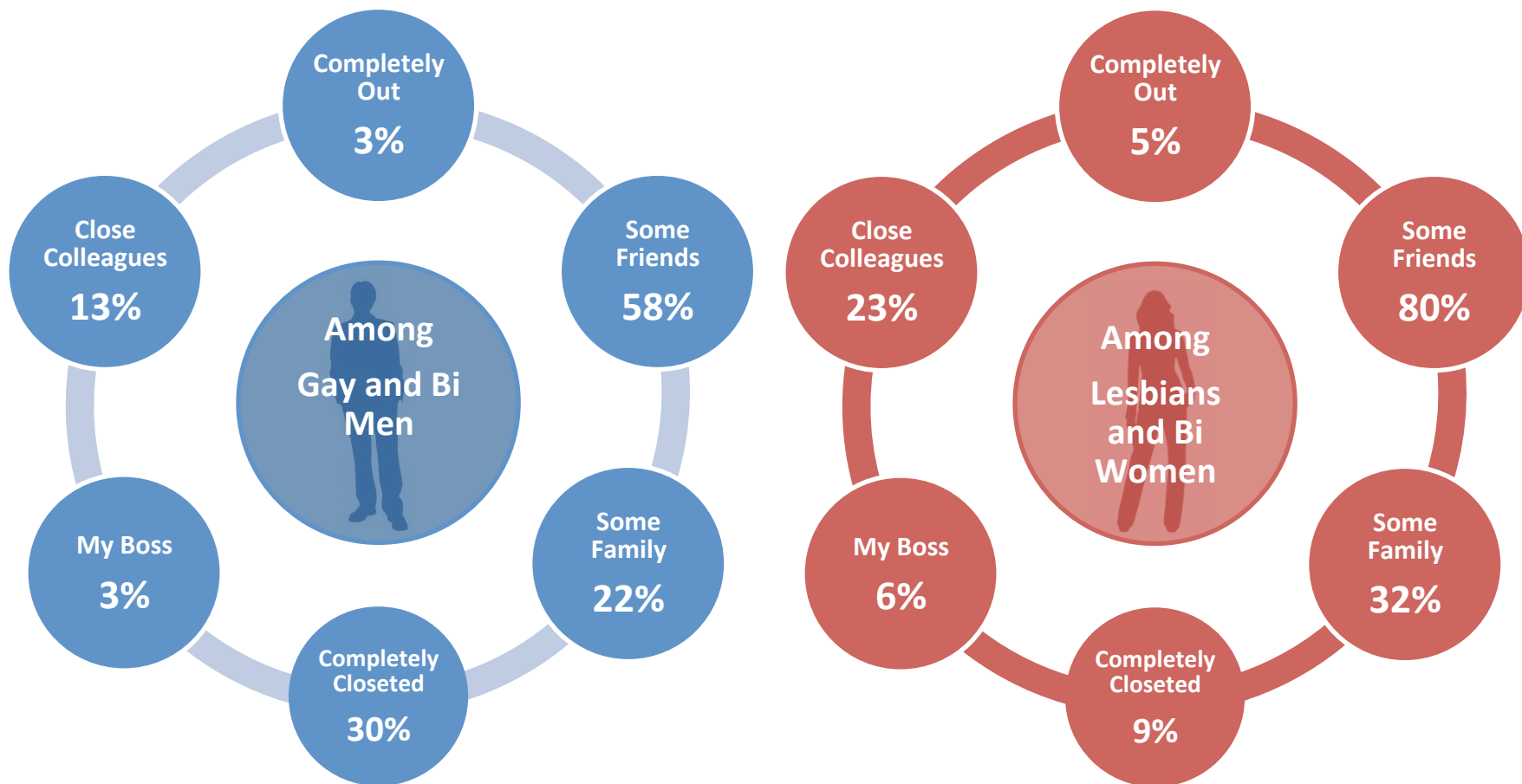
Lesbians / Bi

Response	Gay / Bi Men (%)	Lesbians / Bi (%)
Yes	39%	32%
No	48%	52%
Not sure	13%	16%

Bases: Gay and Bisexual Men n=4,901; Lesbians and Bisexual Women n=2,587; Urban Gay/Bi Men n=1,550 (32%); Urban Lesbians/Bi Women n=984 (38%)

Being “Out”: While men and women surveyed were equally unlikely to be completely out (only 3% and 5% respectively), lesbians and bi women surveyed were far more likely to be somewhat out with friends, family and colleagues compared to gay and bi men, and far less likely to indicate they were completely closeted.

How out are you? (Please mark all that apply.)



Bases: *Gay/Bi Men n=4,887; *Lesbians/Bi Women n=2,576

Being “Out”: Young students are likely to be out to close friends (71%) compared to older professional LGBTs in China (57%), but less likely to be out to family members compared to those 25 and older.

How out are you? (Please mark all that apply.)

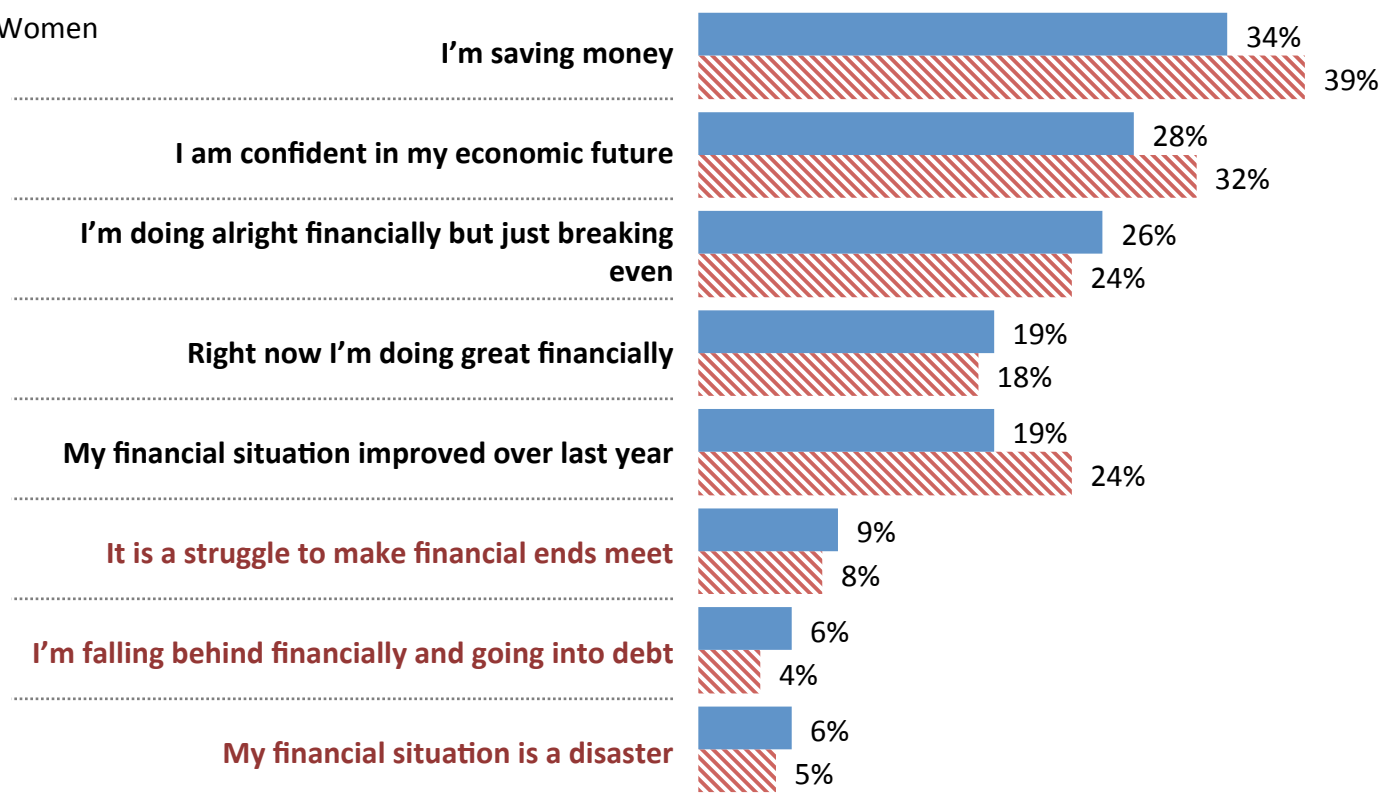
	Students Ages 18-21	Ages 25 and Above
Out to close friends	71%	57%
Completely in closet	20%	27%
Out to some family members	19%	30%
Out to close colleagues	8%	19%
Completely out	3%	4%
Out to boss	1%	5%

Bases: Students Ages 18-21 n=1,843; 25 and Above n=2,925

Financial Confidence: Overall 39% of LGBT participants indicated at least one positive response, 16% indicated at least one negative response, and 45% indicated more neutral responses.

How would you describe your current financial situation? (Mark all that apply)

Gay / Bi Men
Lesbians / Bi Women



Bases: Gay/Bi Men n=4,865; Lesbians/Bi Women n=2,573

LGBT Professionals: LGBTs in China work in a wide variety of industries.

In which industries or professions do you work?

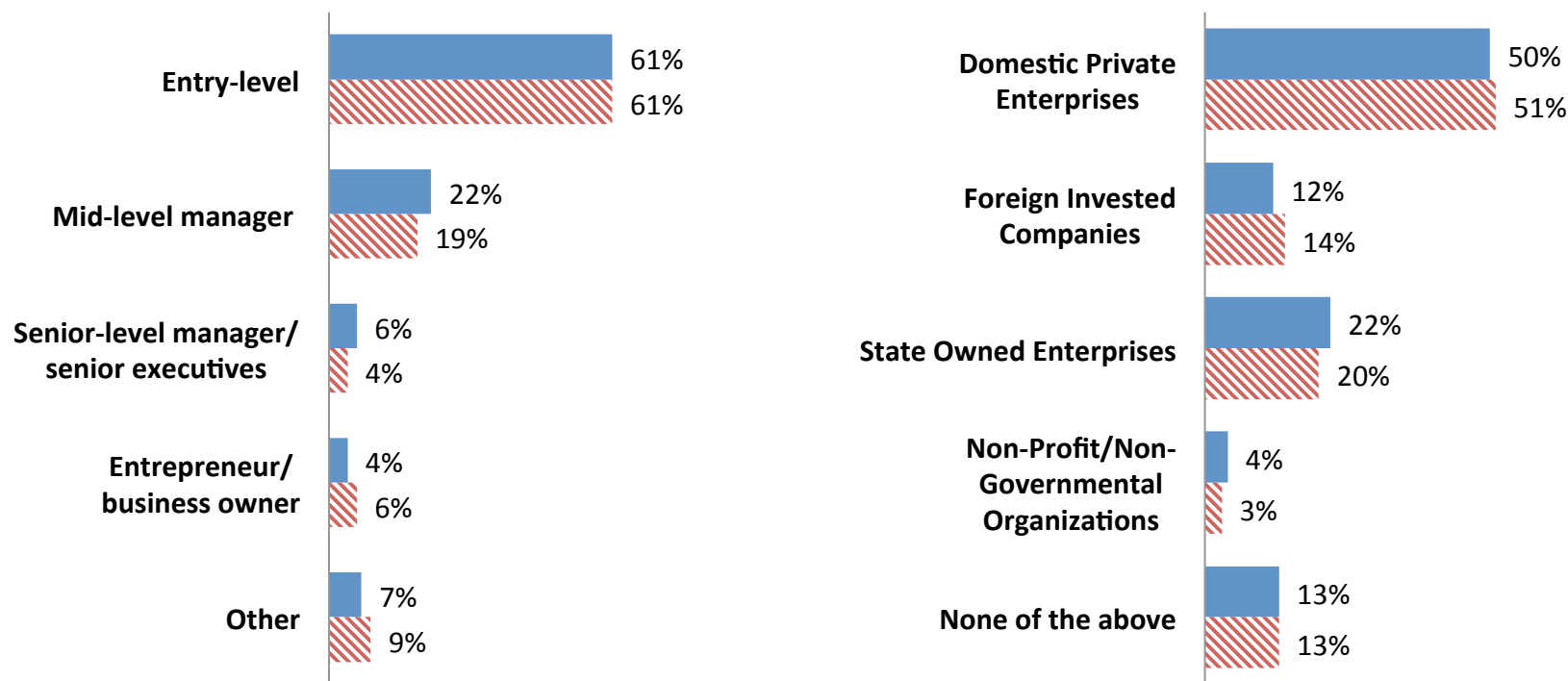
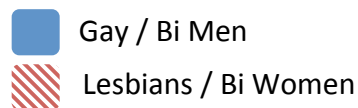
	Among Gay/Bi Men	Among Lesbians/Bi Women
Advertising / Marketing / PR	10%	10%
Manufacturing	10%	4%
Technology / IT / Internet	8%	8%
Government	8%	6%
Education	7%	8%
Financial Services / Accounting	7%	10%
Architecture/ Construction	7%	5%
Food & Beverage Service	7%	8%
Retail	6%	5%
Health care, nursing, medical, etc.	6%	7%
Graphic Arts and Design	5%	7%
Engineering	4%	2%
Entertainment	3%	5%
Food & Beverage Sales or Marketing	3%	3%
Telecommunications	3%	2%
Writer / Author / Journalist / Media	3%	3%
Nonprofit organization/NGO	2%	1%
Hotel / Hospitality	2%	1%
Tourism / Travel	2%	2%
Other	10%	13%



Bases: Lesbians/Bi Women n=1,546; Gay/Bi Men n=2,957

LGBT Professionals: Most LGBTs surveyed occupy entry to mid-level management positions and work for domestic private enterprises and state owned enterprises. This is most likely due to their young age, just entering the workforce.

Position Level and Company Type

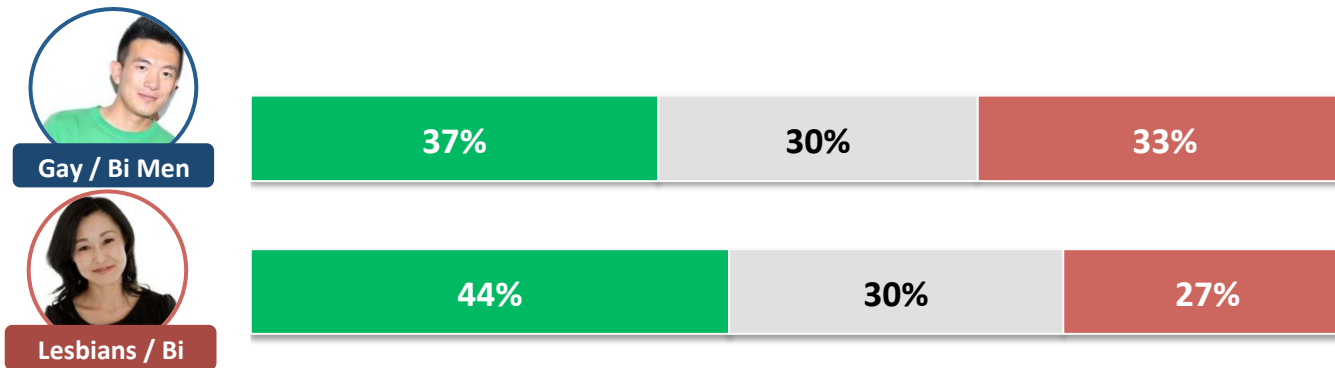


Bases: Lesbians/Bi Women n=1,546; Gay/Bi Men n=2,957

Workplace LGBT Friendliness: Lesbian and bi women were more likely to indicate that they work for an employer that is LGBT-friendly. Only 31% of China LGBTs work for an employer they feel is “unfriendly.”

Please rate how LGBT/gay friendly you feel your workplace is.
(1 point poor to 10 points excellent)

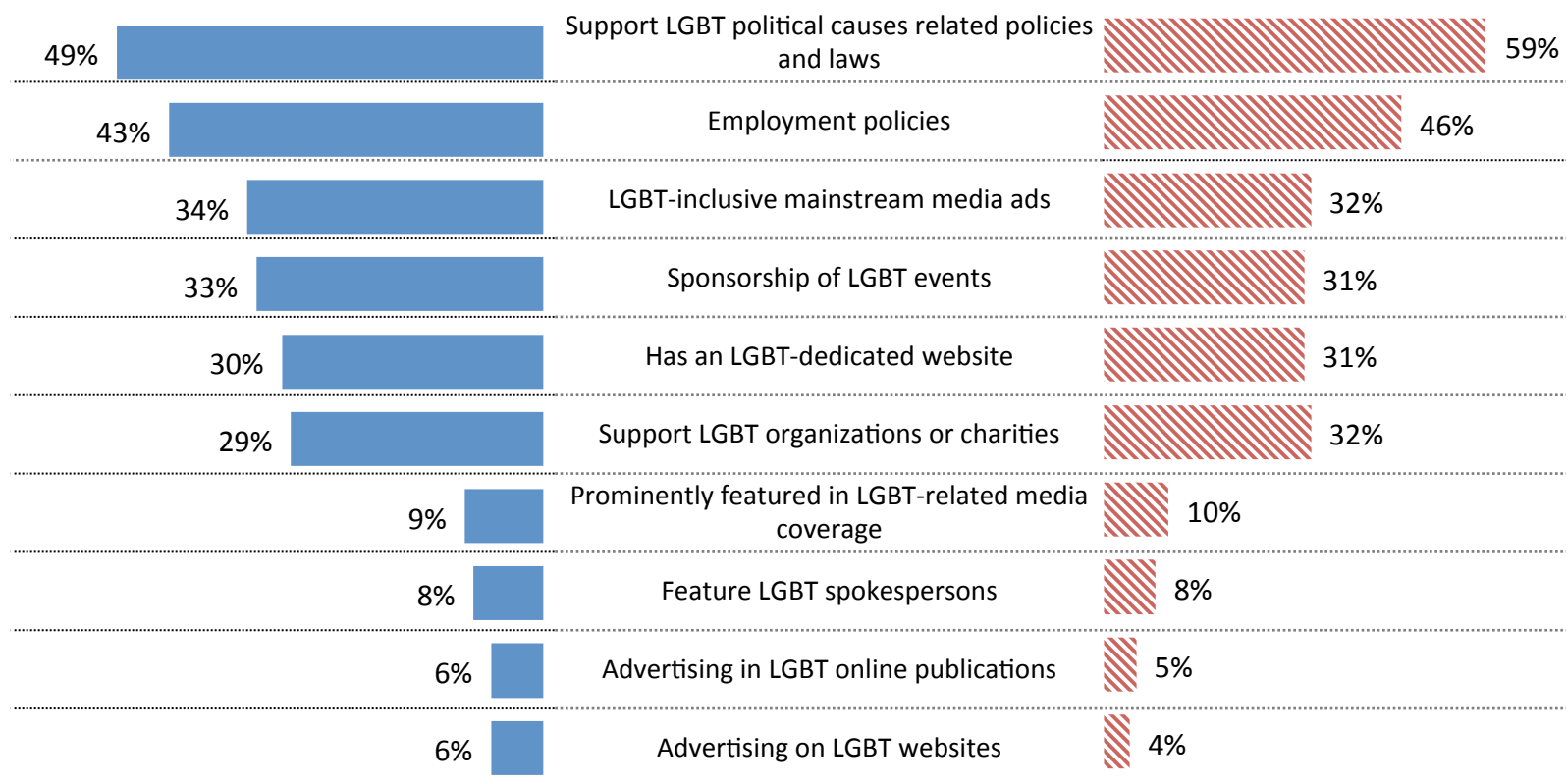
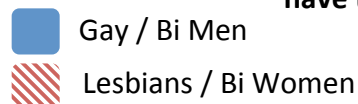
■ Excellent/Above Average 7-10
 ■ Average 5-6
 ■ Poor/Below Average 1-4



Bases: Lesbians/Bi Women n=1,547; Gay/Bi Men n=2,952

Corporate Support: Among both male and female participants, support for LGBT political causes, laws and employment policies are the largest influencers on purchase decisions.

When corporations outreach to the LGBT community in the following ways, which approaches have the biggest impact on influencing your purchasing decisions? Select up to top 3 influencers.

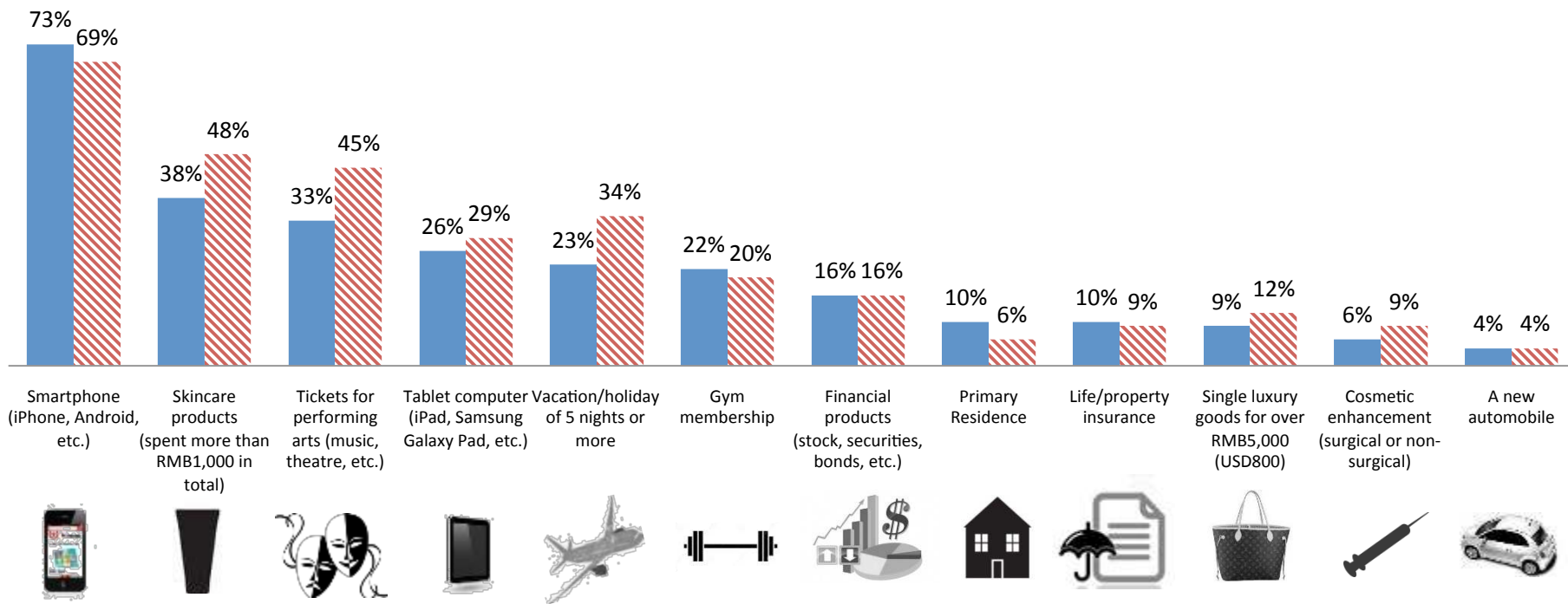


Bases: Gay/Bi Men n=4,786; Lesbians/Bi Women n=2,504

Purchases by Gender: Women purchased more skincare products, tickets for performing arts and 5 night+ vacations compared to men, whereas men indicated more higher priced purchases such as a primary residence.

Please let us know about your purchases over the past year.
(If an item does not apply, skip to the next line.)

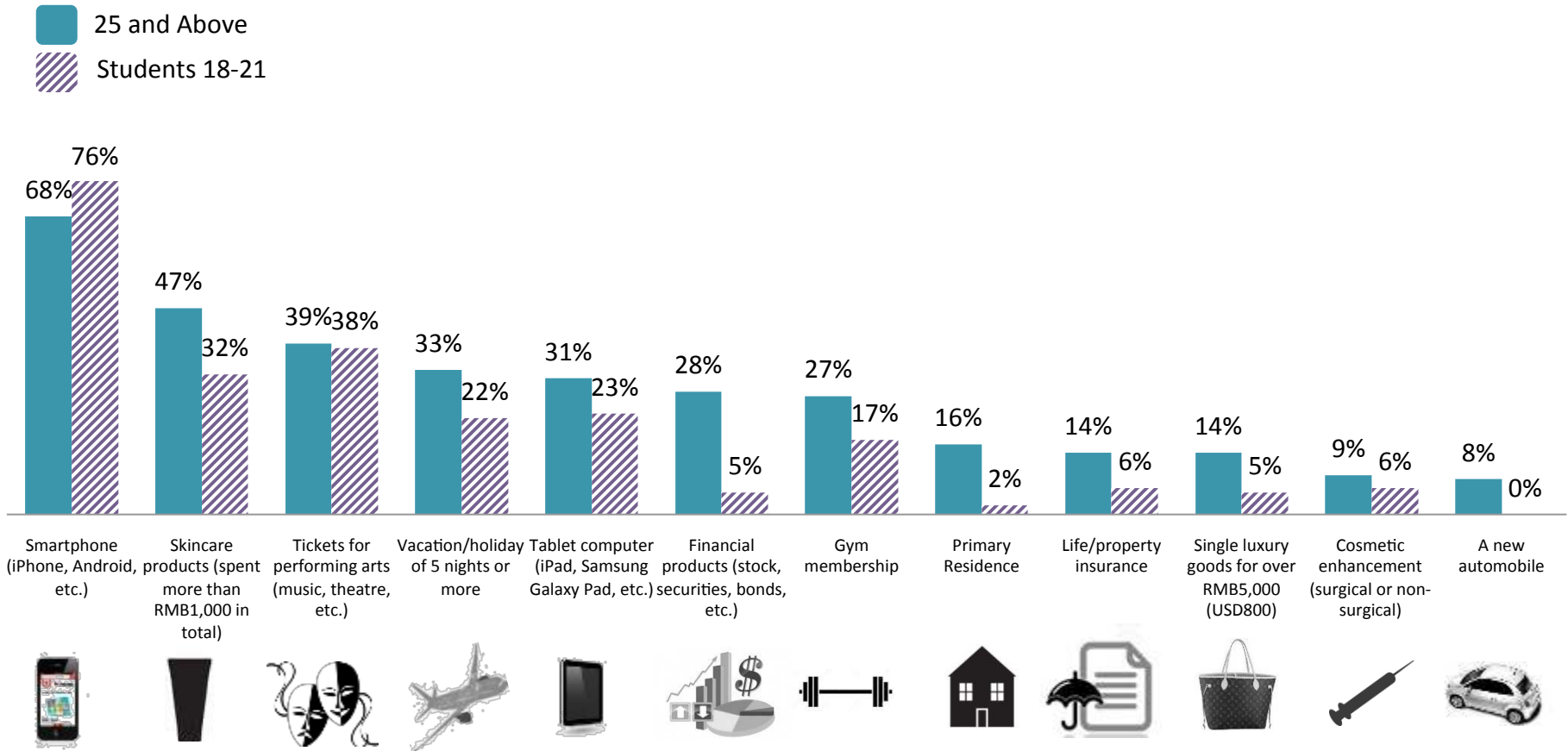
Gay / Bi Men
Lesbians / Bi Women



Bases: Gay/Bi Men n=4,636; Lesbians/Bi Women n=2,499

Purchases: Not surprisingly, older respondents indicated more purchases among all types, with the exception of smartphones.

Please let us know about your purchases over the past year.
(If an item does not apply, skip to the next line.)

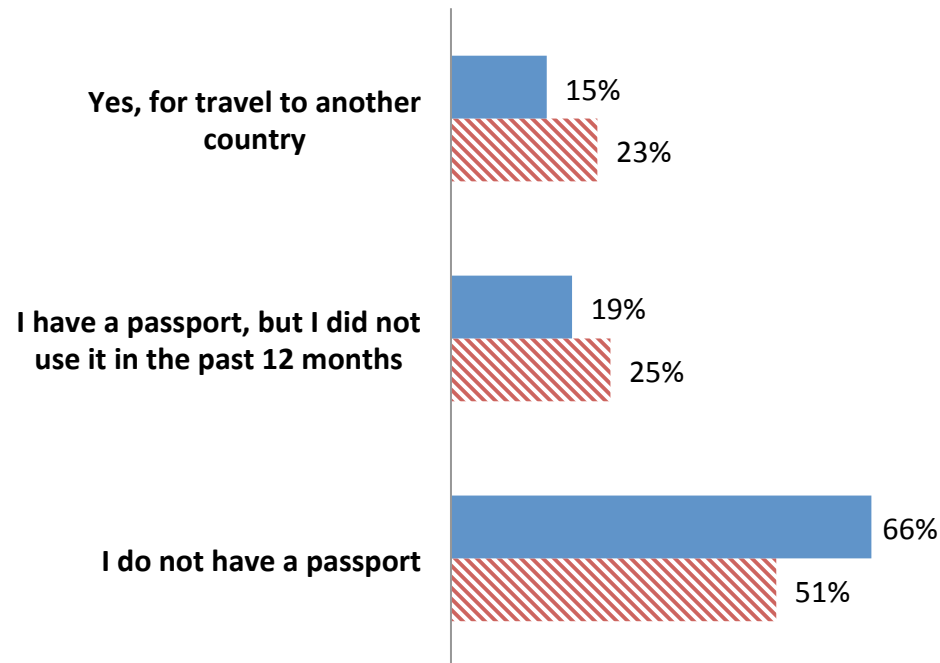


Bases: Students Ages 18-21 n=1,709; 25 and Above n=2,867

Passport Use: 34% of gay and bi men and 49% of lesbians and bi women surveyed indicated that they have a current passport. More lesbians and bisexual women indicated international travel in the past 12 months compared to gay and bisexual men.

Did you use your passport in the past 12 months?

- Gay / Bi Men
- ▨ Lesbians / Bi Women

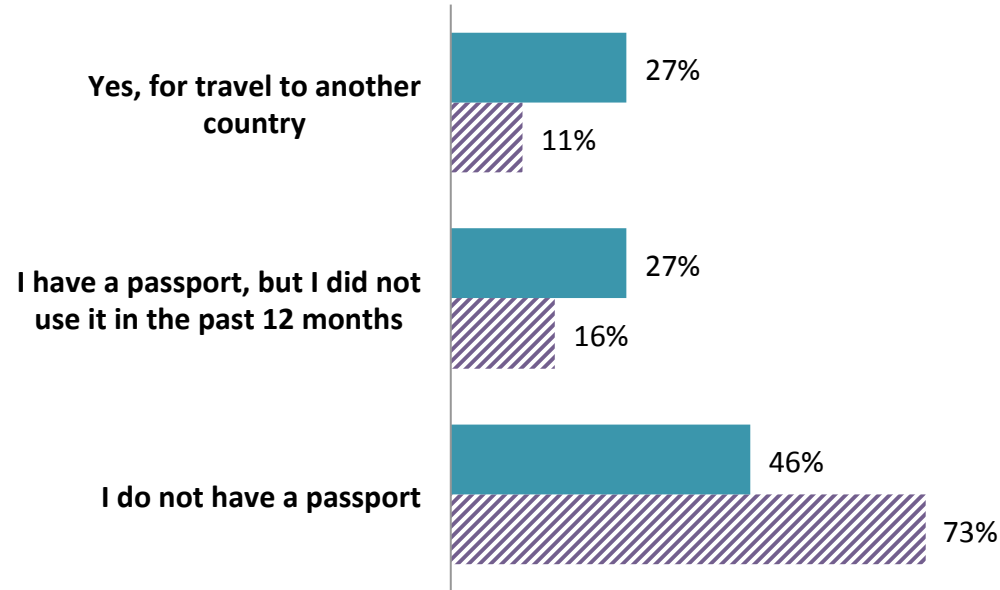


Bases: Gay/Bi Men n=4,889; Lesbians/Bi Women n=2,584

Passport Use: While only 27% of students indicated passport possession, 41% of those with a passport have traveled internationally in the past 12 months, almost on par with those ages 25+ (50% who possess and have used their passport).

Did you use your passport in the past 12 months?

- 25 and Above
- Students 18-21



Bases: Students Ages 18-21 n=1,850 (Passport Holders n=500); 25 and Above n=2,925 (Passport Holders n=1,580)

Lesiure Travel: Lesbians and bi women were more likely than gay and bi men to take a holiday in a foreign country or Hong Kong, Macao, and Taiwan (staying overnight in a hotel), and to take a domestic trip (staying overnight in a hotel) in the past 12 months.

LGBT Leisure Travel

In the past 12 months, have you taken at least one leisure trip or vacation **in China** (staying overnight in a hotel)?

In the past 12 months, have you taken at least one leisure trip or vacation in a **foreign country or Hong Kong, Macao, and Taiwan** (staying overnight in a hotel)?



Lesbians / Bi

Yes!

68%



Lesbians / Bi

Yes!

30%



Gay / Bi Men

Yes!

53%



Gay / Bi Men

Yes!

18%

Bases: Gay and Bisexual Men n=4,901; Lesbians and Bisexual Women n=2,587

Top 20 Domestic Destinations of Those Traveling in Past Year

Follow up question among those who have taken at least one leisure trip or vacation in China in the past year: Please list any destinations in China (specific to city) you traveled to in the past year for vacation and spent at least one night in a hotel (list up to five).



Rank	Destination	% Visited
1	Beijing	22.2%
2	Shanghai	21.4%
3	Hangzhou	15.7%
4	Chengdu	13.7%
5	Xiamen	11.1%
6	Guangzhou	10.5%
7	Nanjing	9.5%
8	Xi'an	8.8%
9	Shenzhen	8.1%
10	Suzhou	7.8%

Rank	Destination	% Visited
11	Qingdao	7.3%
12	Chongqing	7.1%
13	Wuhan	6.5%
14	Tianjin	5.4%
15	Changsha	5.4%
16	Lijiang	4.9%
17	Dalian	4.8%
18	Kunming	4.5%
19	Sanya	4.4%
20	Guilin	3.7%

Bases: All LGBT n=3,942

Top Asian Destinations of Those Traveling Internationally in Past Year

Follow up question among those who have taken at least one leisure trip or vacation outside mainland China in the past year: Which of the following countries and areas did you travel to in the past year for vacation and spent at least one night in a hotel? (Please mark all that apply.)



Destination	Among Gay/Bi Men	Among Lesbian/Bi Women
Hong Kong	61%	58%
Thailand	38%	29%
Macao	25%	24%
Taiwan	17%	14%
South Korea	14%	15%
Japan	12%	11%
Malaysia	12%	10%
Singapore	9%	7%
Cambodia	5%	4%
Maldives	5%	2%
Vietnam	4%	3%
Indonesia	3%	4%
Philippians	3%	5%
UAE	2%	1%

81%

Traveled to
Asian
Destinations

Bases: All LGBT traveled outside mainland China n=1,712; Traveled to Asian destinations (81%) n=1,395; Gay/Bi Men n=727; Lesbians/Bi Women n=647

Top European Destinations of Those Traveling Internationally in Past Year



Follow up question among those who have taken at least one leisure trip or vacation outside mainland China in the past year: Which of the following countries and areas did you travel to in the past year for vacation and spent at least one night in a hotel? (Please mark all that apply.)

European Destinations	Among Gay/Bi Men	Among Lesbian/Bi Women
France	37%	35%
Germany	31%	26%
Italy	26%	27%
United Kingdom	21%	35%
Switzerland	18%	21%
Spain	17%	15%
Netherland	11%	16%
Austria	9%	6%
Russia	9%	6%
Czech Republic	8%	2%
Belgium	6%	10%
Finland	6%	3%
Greece	6%	3%
Sweden	6%	7%
Turkey	6%	5%
Denmark	4%	3%
Iceland	4%	3%
Ireland	4%	4%
Norway	2%	5%

14%
Traveled to
European
Destinations

Bases: All LGBT traveled outside mainland China n=1,712; Traveled to European destinations (14%) n=241; Gay/Bi Men n=141; Lesbians/Bi Women n=96

Other Destinations of Those Traveling Internationally in Past Year

Follow up question among those who have taken at least one leisure trip or vacation outside mainland China in the past year: Which of the following countries and areas did you travel to in the past year for vacation and spent at least one night in a hotel? (Please mark all that apply.)



20%
Traveled to other international Destinations

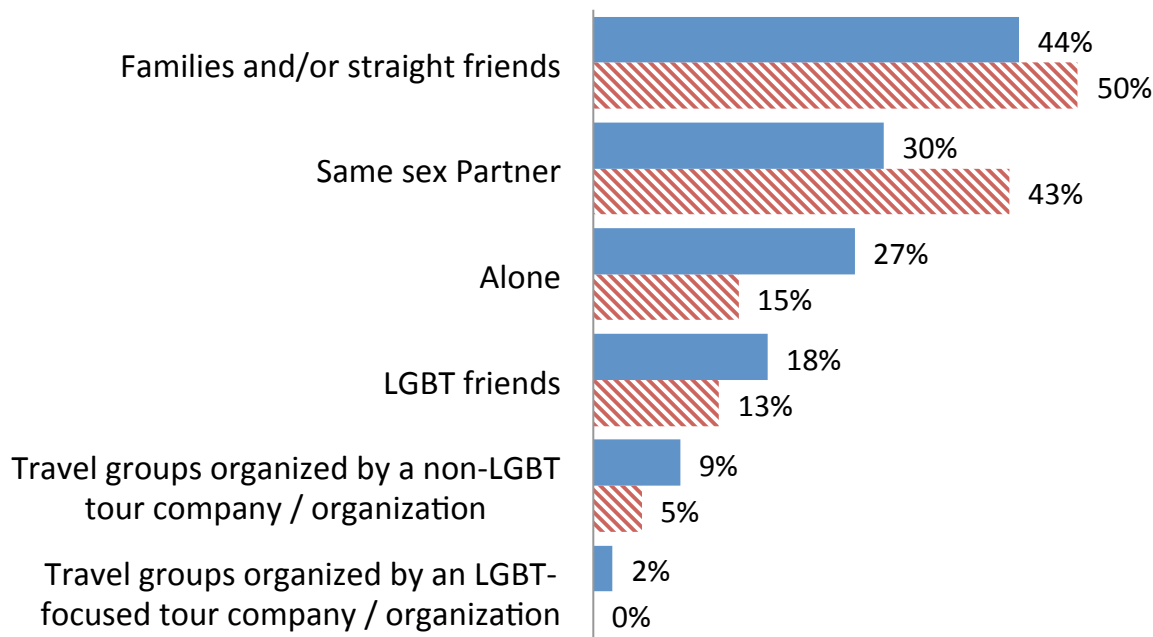
Other Destinations	Among Gay/Bi Men	Among Lesbian/Bi Women
United States	42%	46%
Australia	18%	16%
Canada	10%	10%
New Zealand	9%	8%
Mexico	3%	3%
Brazil	3%	1%
Egypt	3%	1%
South Africa	3%	0%
Peru	2%	0%
Caribbean Islands	1%	4%
Argentina	1%	1%
South Pacific Islands (Tahiti, Fiji, etc.)	1%	4%
Other destinations	36%	27%

Bases: All LGBT traveled outside mainland China n=1,712; Traveled to other international destinations (20%) n=340; Gay/Bi Men n=198; Lesbians/Bi Women n=135

Travel Parties: LGBTs travel with a variety of straight and LGBT friends, partners and family. Gay men and bi men indicated more single travel on their most recent trip, compared to women who traveled with same-sex partners.

Follow up question among those who have taken at least one leisure trip or vacation outside mainland China in the past year:
On your most recent foreign vacation, with whom did you travel?
 (Please mark all that apply.)

- Gay / Bi Men
- ▨ Lesbians / Bi Women

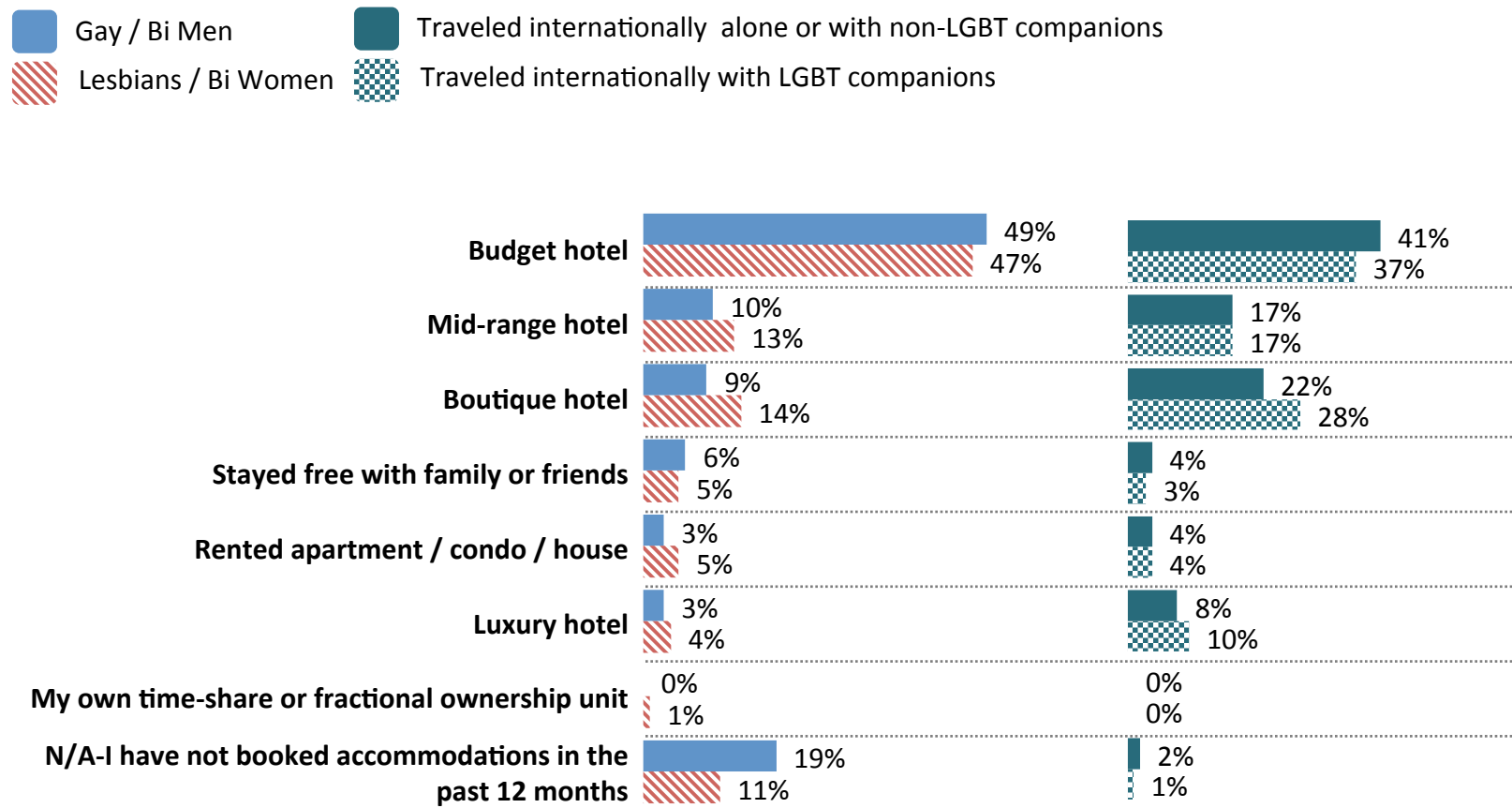


Bases: Gay/Bi Men n=882; Lesbians/Bi Women n=761

Leisure Travel Accommodations:

While budget and mid-range hotels topped the list of leisure accommodations, those traveling with other LGBTs internationally indicated more boutique and luxury hotel bookings.

When traveling for leisure or vacation in the past 12 months, what type of accommodation did you most often book?



Bases: Gay/Bi Men n=4,871; Lesbians/Bi Women n=2,578; Traveled internationally alone or with non-LGBT companions n=1,127; Traveled internationally with LGBT companions n=766

LGBT Event Travel: Circuit parties and Pride events are the most popular LGBT events traveled to among most cohorts. Lesbians and bisexual women did indicate more lesbian and women-specific event interest versus general LGBT event interest such as Pride.

In the past 12 months, have you traveled to another city (requiring an overnight stay) to attend any of the following LGBT community events? (Please mark all that apply.)



Gay / Bi Men

16%

Have traveled for an LGBT event



LGBT circuit party / dance event	34%	Lesbian community event	42%
LGBT theme event	25%	LGBT circuit party / dance event	18%
LGBT Pride event	23%	Women's event (not lesbian-specific)	17%
LGBT cultural, arts or film event	22%	LGBT Pride event	16%
LGBT professional association meeting or conference	8%	LGBT cultural, arts or film event	11%



Lesbians / Bi

22%



Among those traveled internationally with same sex partner



31%

Have traveled for an LGBT event



LGBT circuit party / dance event	32%	LGBT circuit party / dance event	42%
LGBT Pride event	23%	LGBT Pride event	30%
Lesbian community event	15%	LGBT theme event	24%
LGBT cultural, arts or film event	15%	LGBT cultural, arts or film event	20%
LGBT theme event	13%	Lesbian community event	13%

Among those traveled internationally with LGBT friends/ travel groups



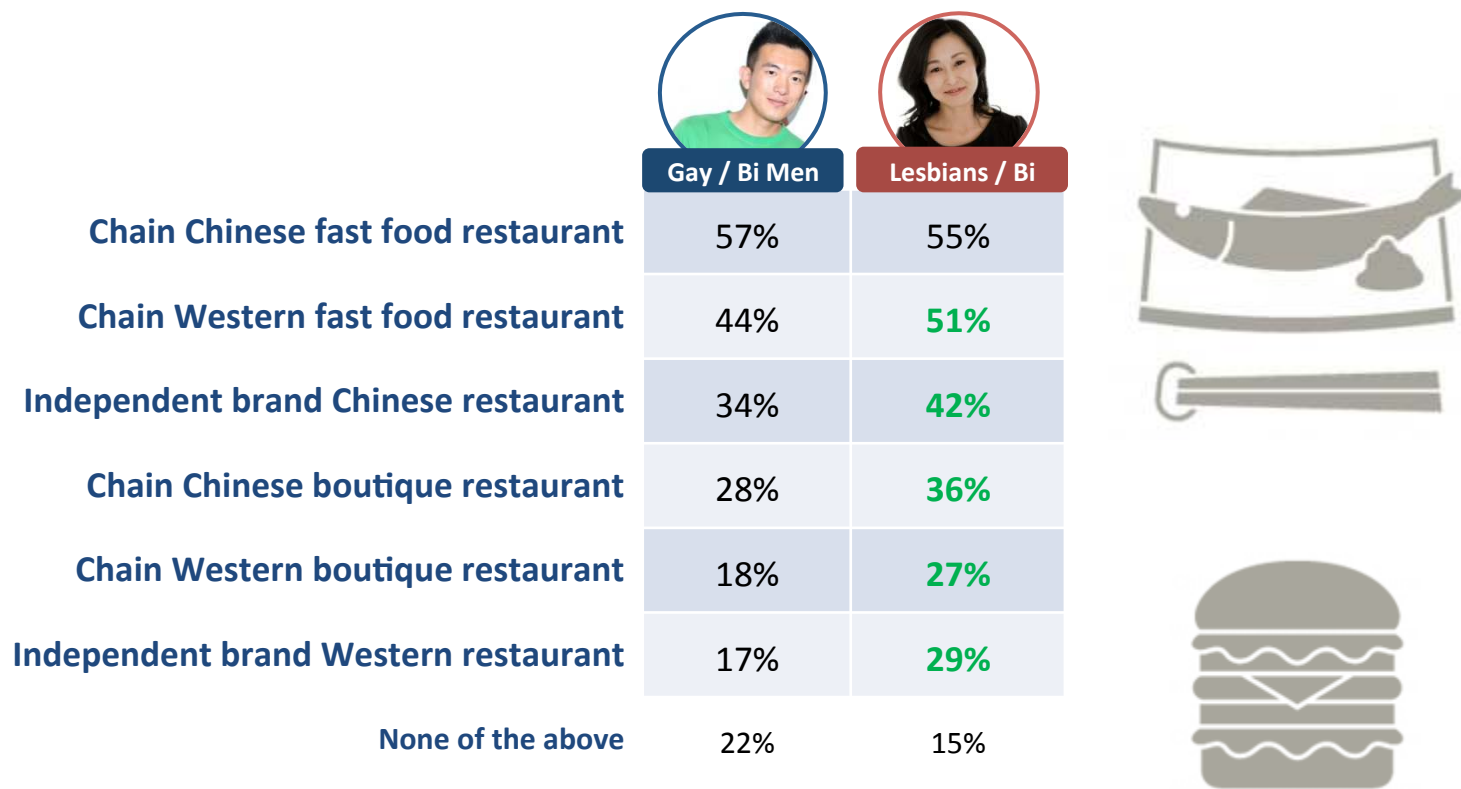
38%



Bases: Gay/Bi Men n=4,694; Lesbians/Bi Women n=2,437; Traveled with Same-Sex Partner n=595; Traveled with LGBT Friends or Travel group n=266

Dining Out: Compared to gay and bisexual men, lesbians and bisexual women indicated more dining out in nearly every category compared. Chain Chinese and Chain Western fast food rank highest among both men and women for weekly consumption.

In the past 7 days, have you dined in a? (Please mark all that apply.)

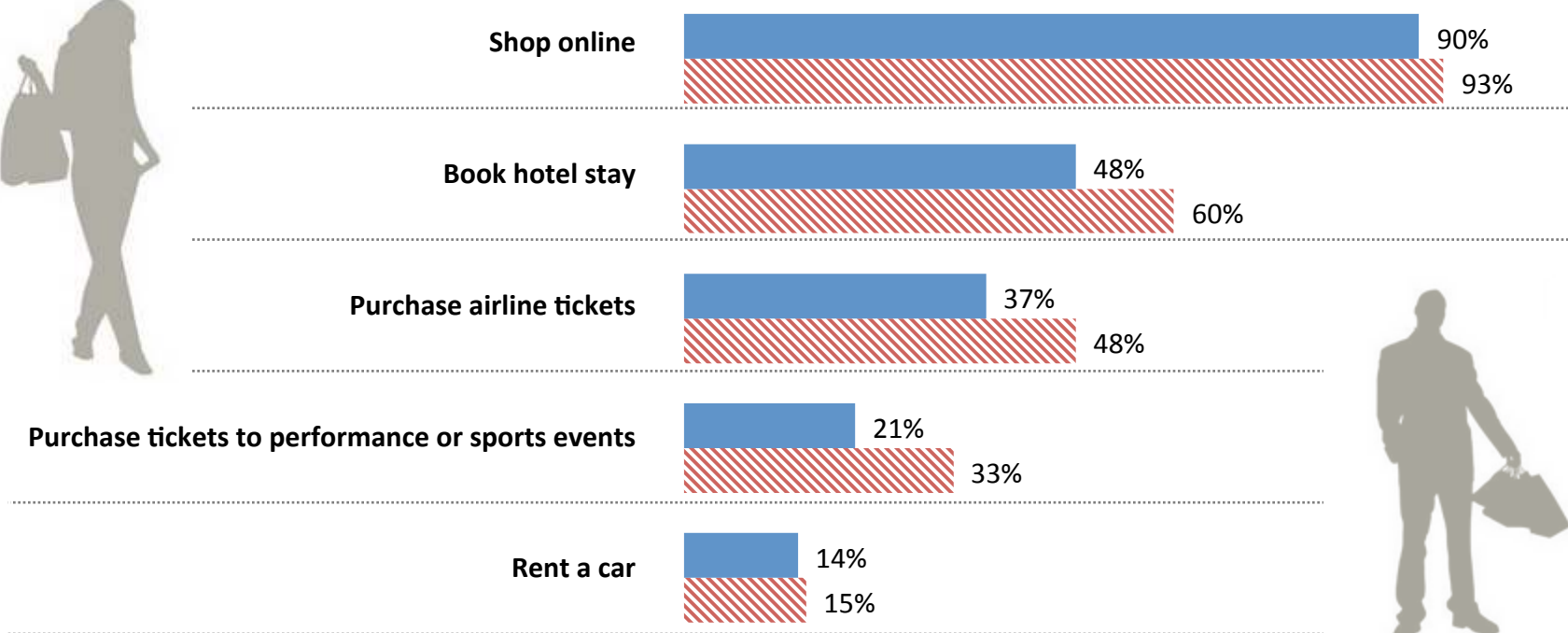


Bases: Gay/Bi Men n=4,878; Lesbians/Bi Women n=2,570

Mobile Purchases: 9 out of 10 Chinese LGBTs surveyed indicated making a mobile purchase in the past year. Lesbians and bi women indicated more travel purchases and sports ticket/performance purchases than gay and bi men.

In the past year, have you used your mobile device to? (Please mark all that apply.)

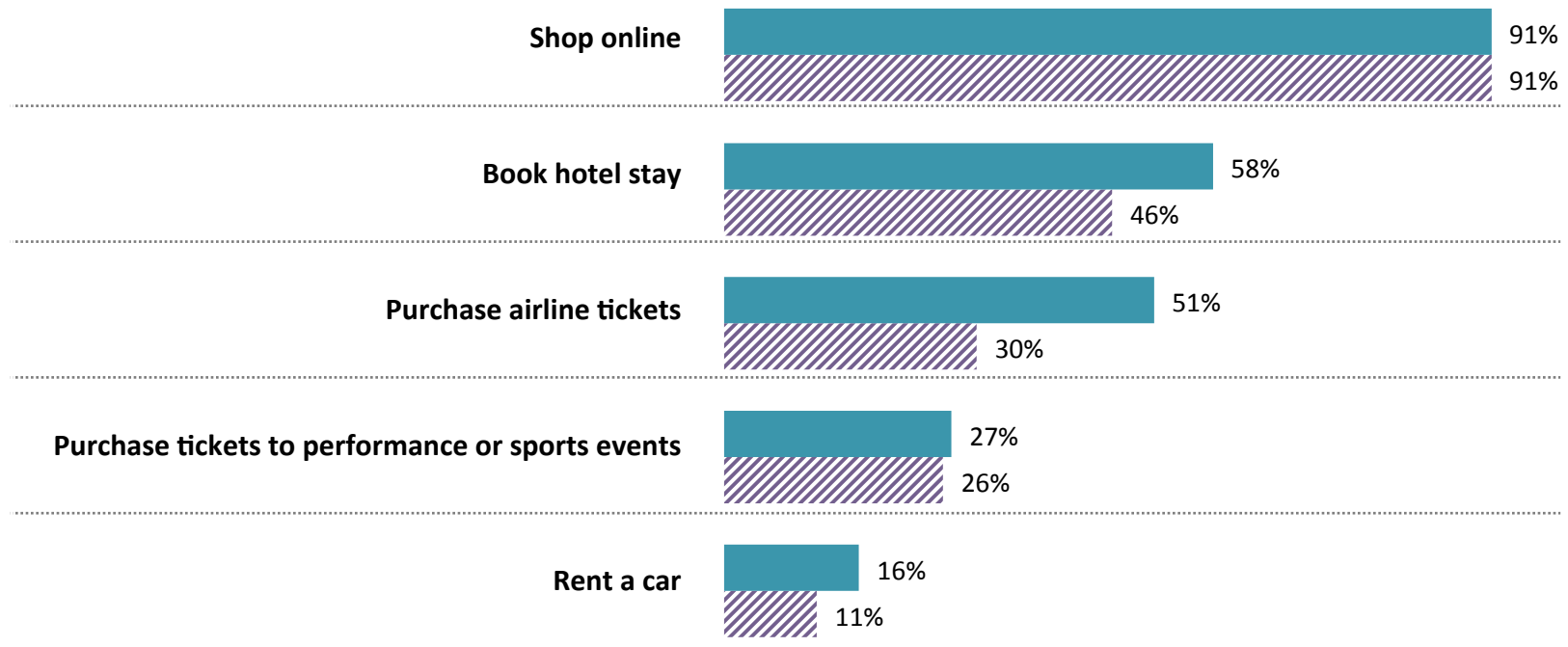
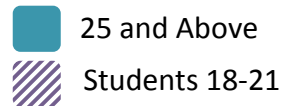
■ Gay / Bi Men
▨ Lesbians / Bi Women



Bases: Gay/Bi Men n=4,894; Lesbians/Bi Women n=2,584

Mobile Purchases: Mobile shopping is prevalent among both young students and older LGBTs, with 30% of students making mobile airline purchases and nearly half booking hotels. Not surprisingly, higher proportions of LGBTs 25+ indicated airline (51%) and hotel bookings (58%).

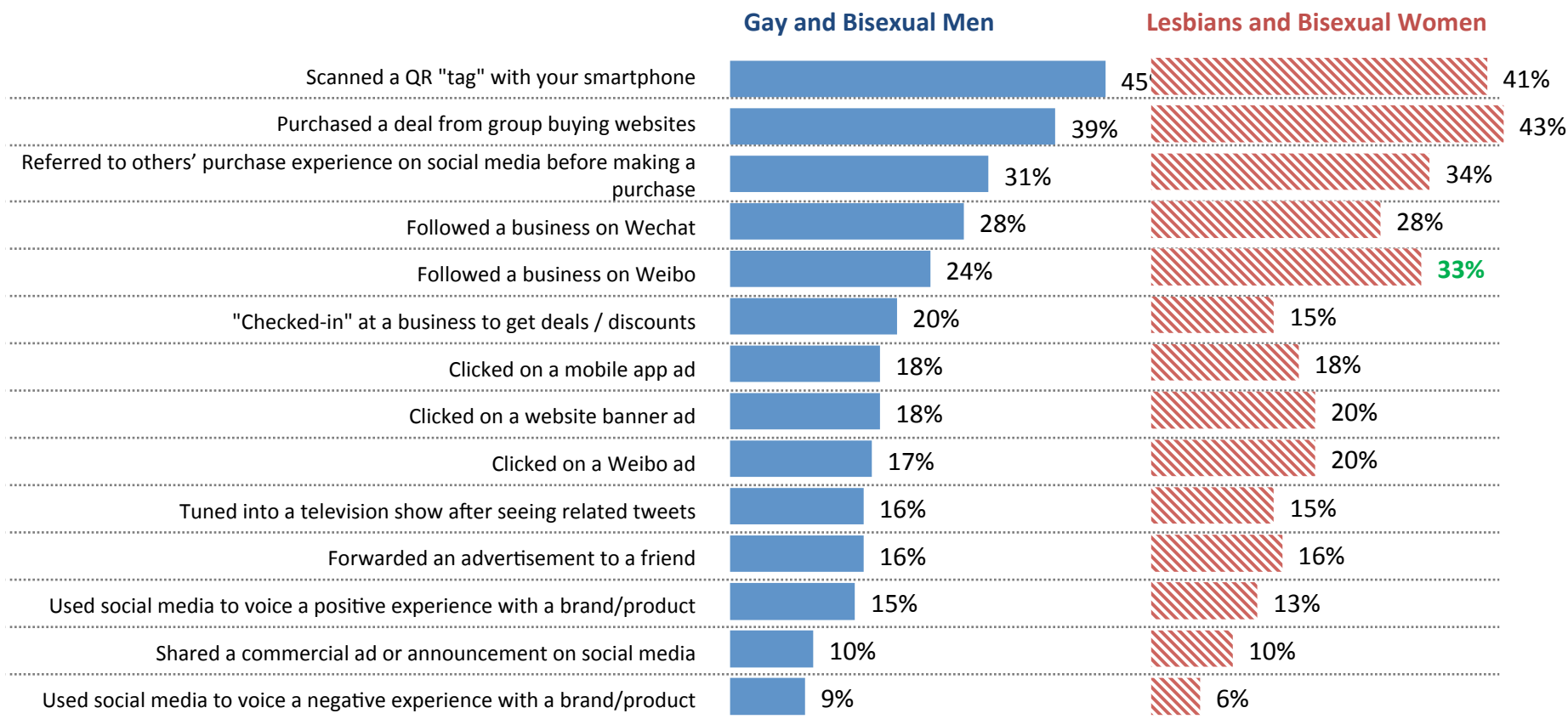
In the past year, have you used your mobile device to? (Please mark all that apply.)



Bases: Students Ages 18-21 n=1,849; 25 and Above n=2,930

Interaction with Advertising: LGBTs are interacting similarly with various methods of advertising. QR tags, deal sites and social media reviews draw the most interaction from both men and women.

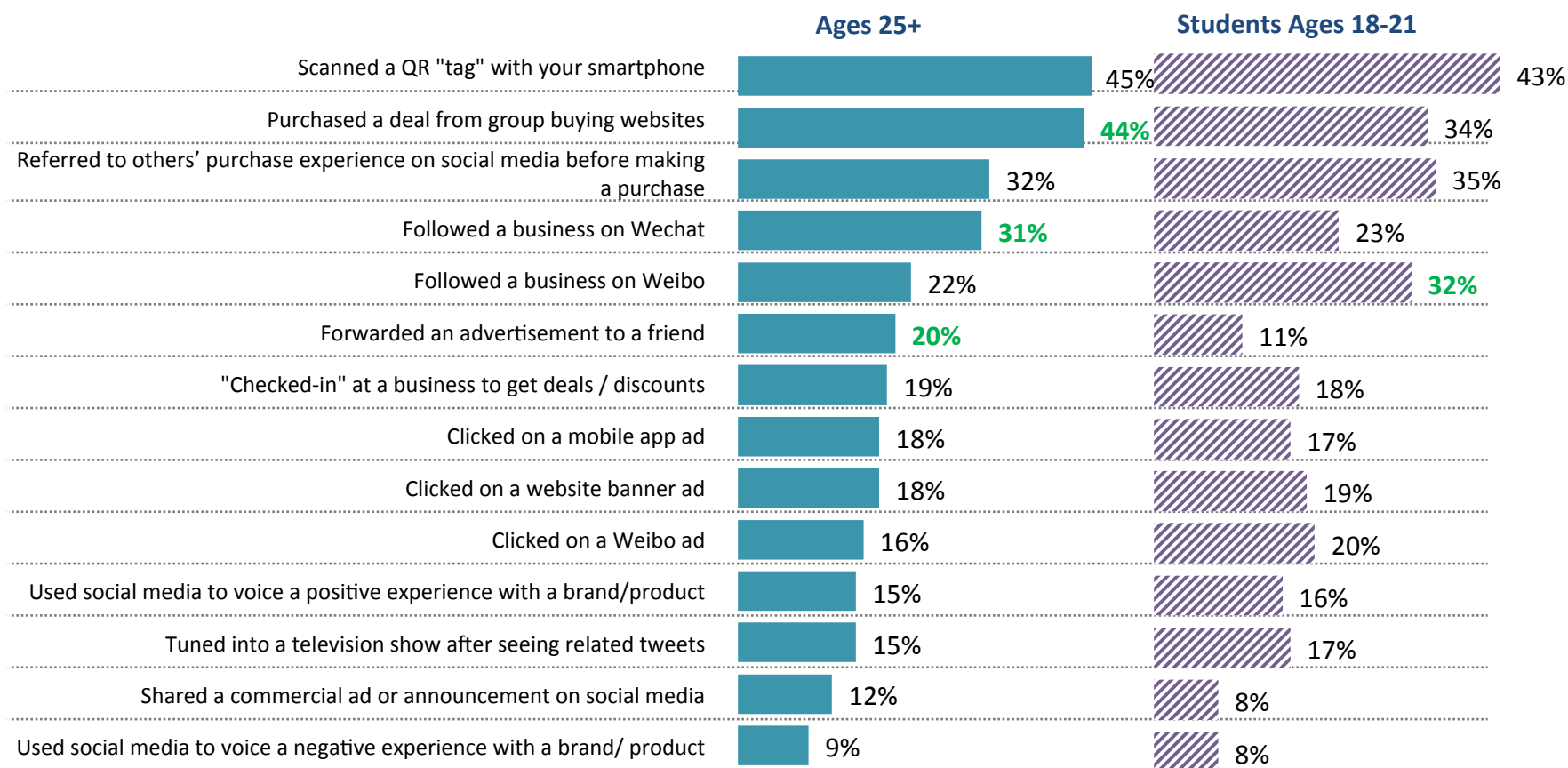
In the past 7 days have you...?
(Mark all that apply.)



Bases: Gay/Bi Men n=4,579; Lesbians/Bi Women n=2,432

Interaction with Advertising: Weibo appears to be more popular among young students versus Wechat for those 25+. QR tags, deal sites and social media reviews still top the list of weekly ad interactions.



In the past 7 days have you...?
(Mark all that apply.)



Bases: Students Ages 18-21 n=1,717; 25 and Above n=2,760

Media Consumption: LGBT mobile app use and LGBT website viewership is fairly prevalent among all cohorts, while more tradition media such as newspapers and radio rank lower. LGBT online publications and dedicated online programming also rank low, likely due to lack of access or availability.

In the past 7 days, have you read, viewed, or listened to...? *(Please select all that apply.)*

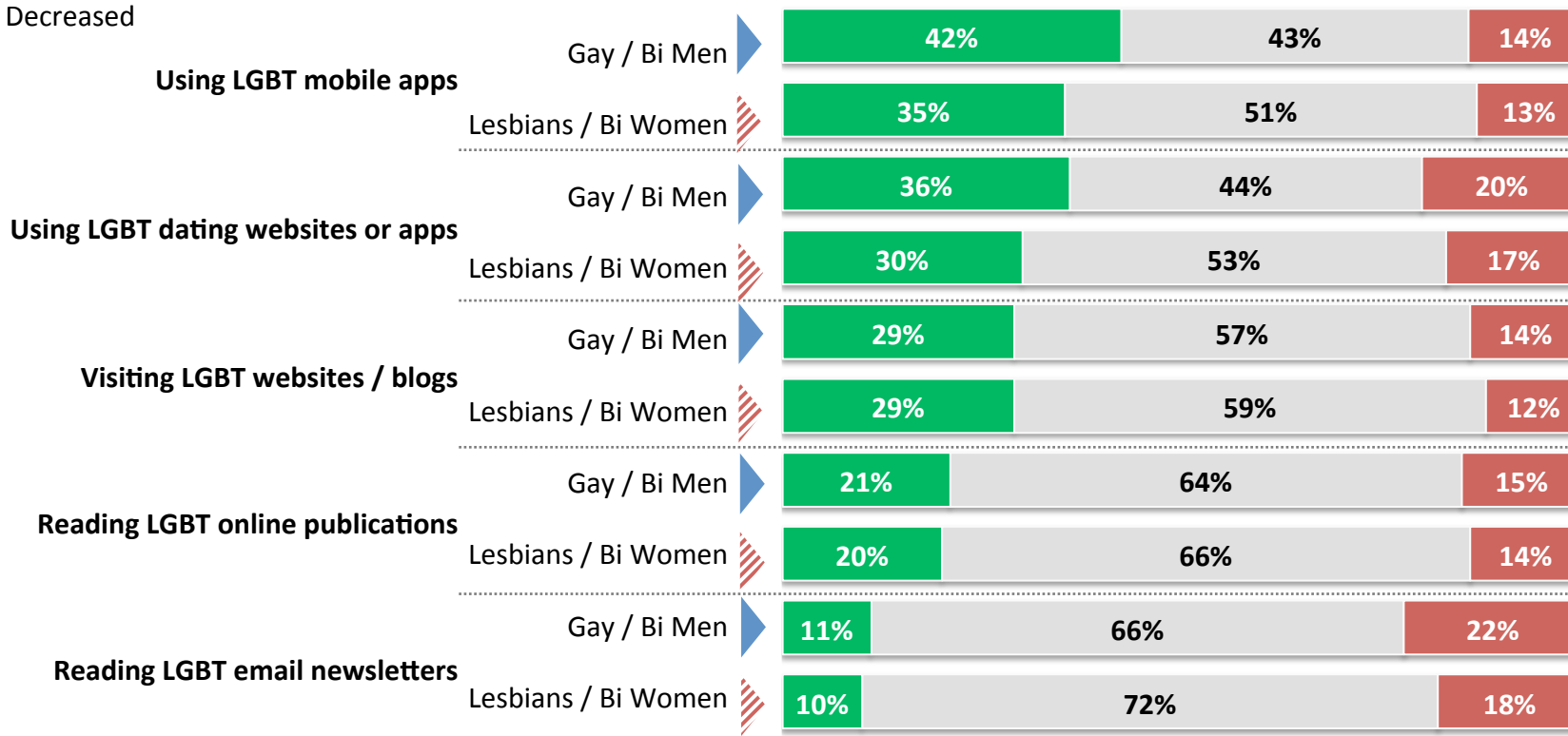
	 Gay / Bi Men	 Lesbians / Bi	Students Ages 18-21	Ages 25 and Above
LGBT mobile apps	45%	36%	44%	41%
LGBT websites / blogs	44%	36%	42%	42%
Network / cable television	39%	42%	45%	40%
Streaming video (TV or movies) on your computer	39%	42%	42%	41%
Mainstream websites / blogs	36%	37%	37%	41%
LGBT online publication(s)	24%	13%	20%	21%
Mainstream general newspapers	19%	15%	18%	20%
Mainstream magazines	18%	19%	21%	18%
LGBT-dedicated online programming	16%	14%	15%	15%
Mainstream radio	12%	13%	13%	14%
LGBT radio (on the air or streaming online)	10%	17%	15%	11%
Satellite radio	10%	15%	9%	16%
LGBT email newsletters	7%	5%	5%	7%
Mainstream email newsletters	6%	6%	5%	7%

Bases: Gay/Bi Men n=4,860; Lesbians/Bi Women n=2,555; Students Ages 18-21 n=1,831; 25 and Above n=2,906

Media Consumption Changes: LGBT mobile app use shows the largest consumption increase in the past 12 months among all LGBT media listed. LGBT dating sites also show similar rates of interaction growth.

Has your interaction with LGBT media (newspapers, websites, etc.) changed over the past 12 months?

- Increased
- Same
- Decreased



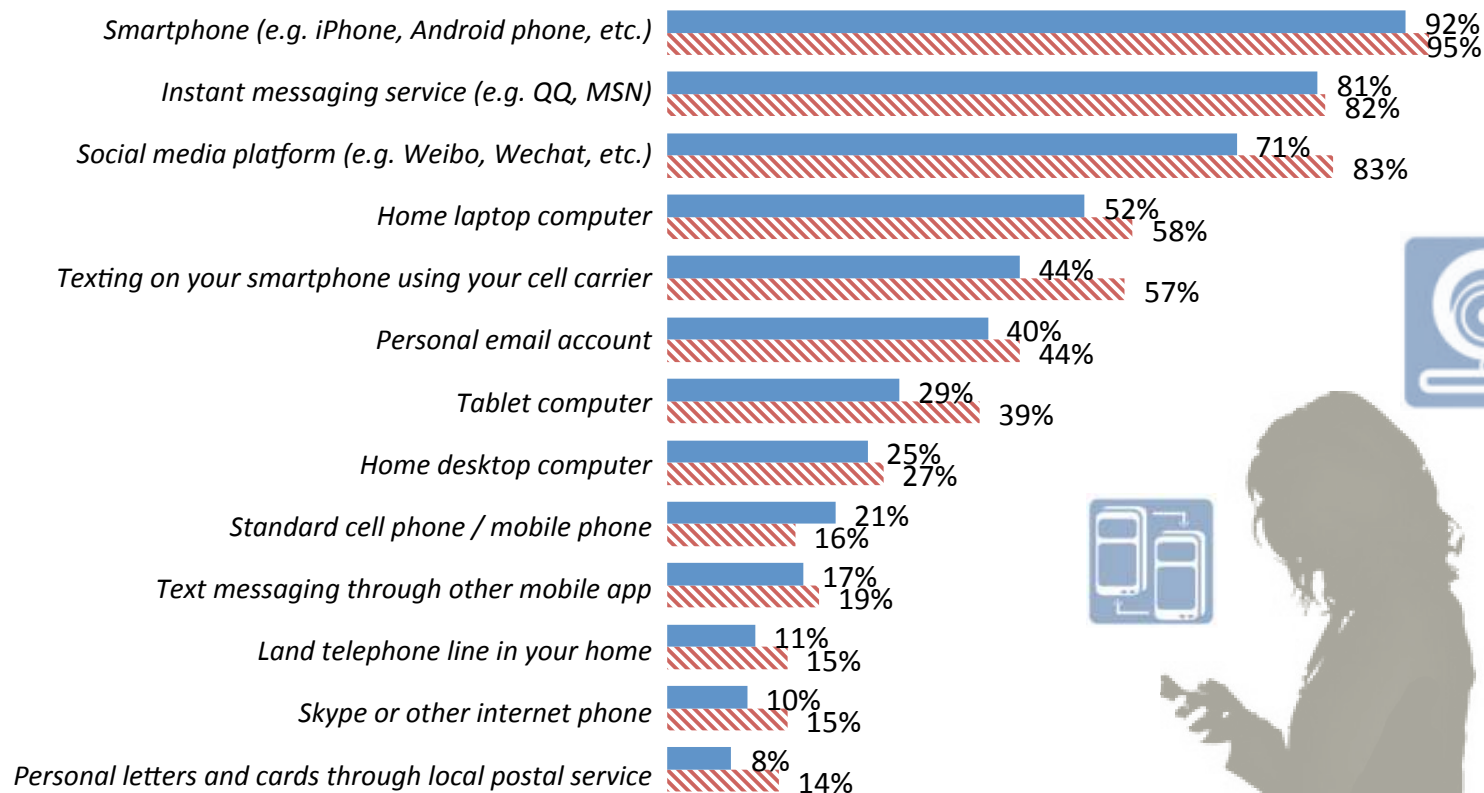
Bases: Gay/Bi Men n=3,871; Lesbians/Bi Women n=1,999

Communication Tools: Instant messaging and combination communication/social media platforms such as Weibo and Wechat have become the largest personal communication tools used over standard land and mobile phones.

Do you own or use any of the following tools for your personal communication (not work)?
(Mark all that apply.)

Gay / Bi Men

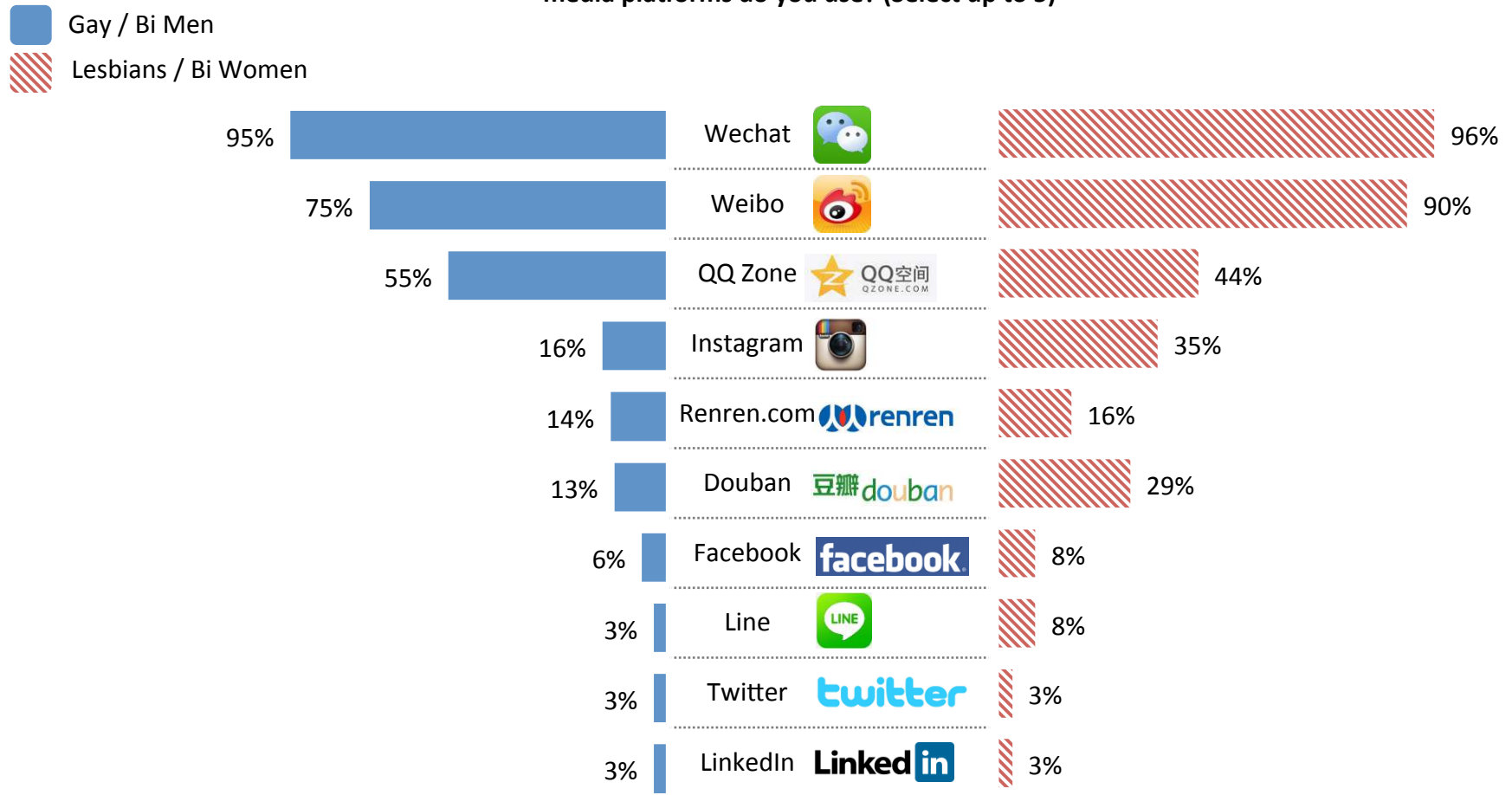
Lesbians / Bi Women



Bases: Gay/Bi Men n=4,901; Lesbians/Bi Women n=2,587

Social Media: Wechat and Weibo are the leaders among *non-LGBT specific* social media sites.

You said you use social media platform for personal communication, what are the top social media platforms do you use? (Select up to 5)*

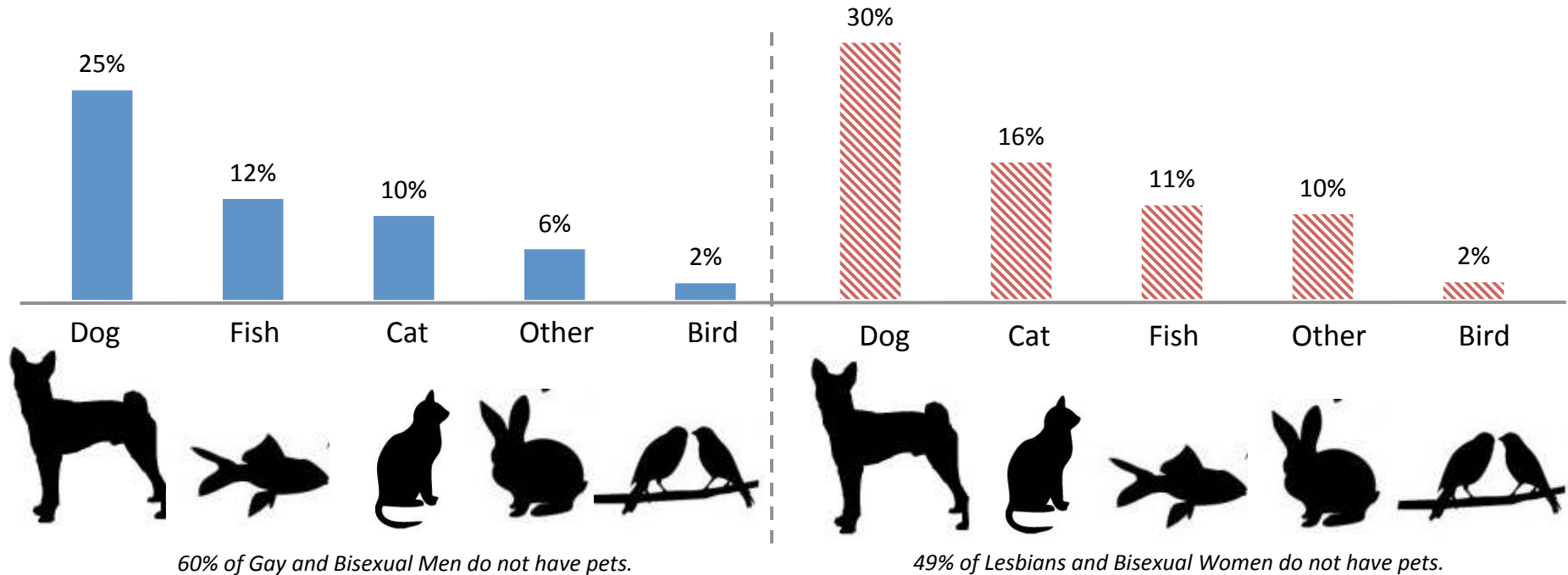


Bases: Gay/Bi Men n=3,498; Lesbians/Bi Women n=2,144

Pets: Lesbians and bisexual women are more likely to care for pets compared to men.

What kind(s) of pet(s) do you care for in your home, if any?
(Mark all that apply.)

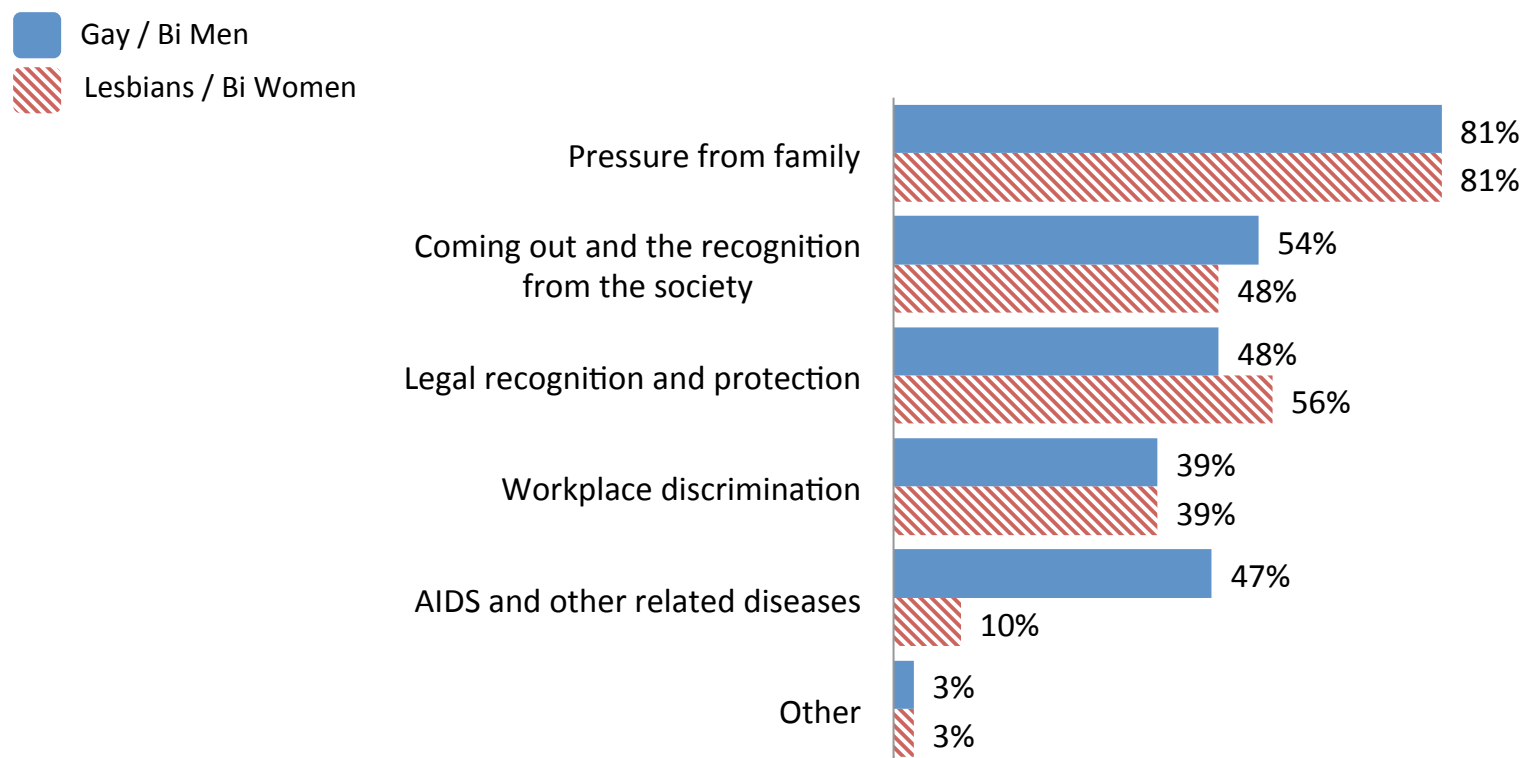
■ Gay / Bi Men
▨ Lesbians / Bi Women



Bases: Gay/Bi Men n=4,874; Lesbians/Bi Women n=2,574

LGBT Concerns: Pressure from family is the biggest concern among both gay and bi men and lesbians and bi women. Gay men and bisexual men are also very concerned about AIDS and other related diseases.

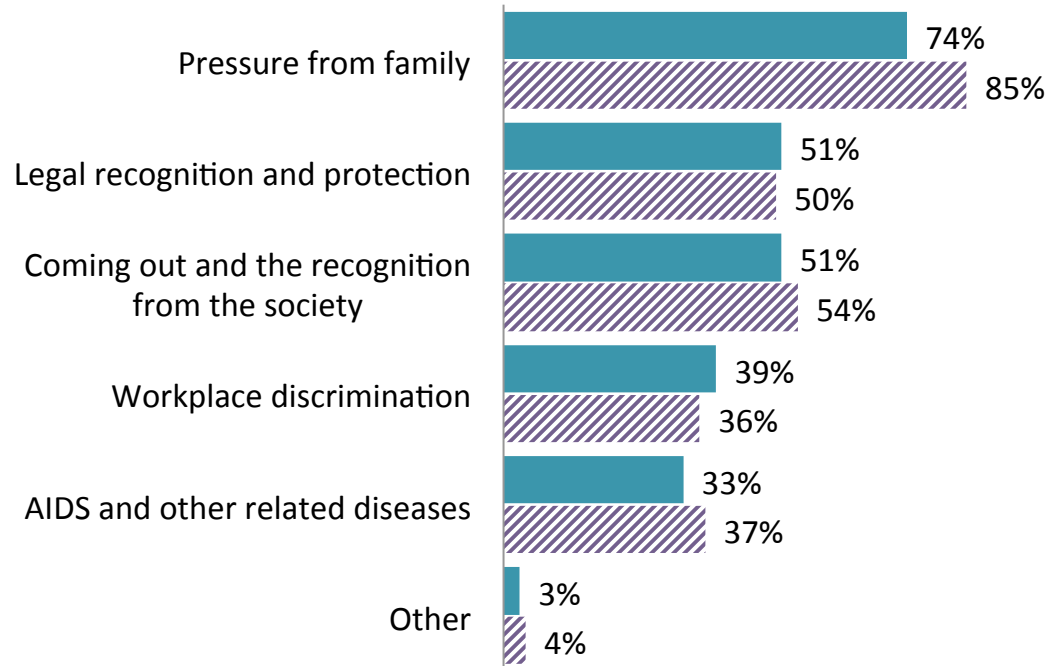
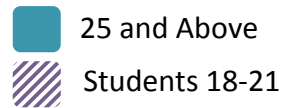
What's your biggest concern as being one of the LGBT community?
(Please mark all that apply.)



Bases: Gay/Bi Men n=4,890; Lesbians/Bi Women n=2,572

LGBT Concerns: Young students ranked each of the following concerns similarly to those ages 25 and over, but pressure from family appears to weigh slightly heavier on those who are younger.

What's your biggest concern as being one of the LGBT community?
(Please mark all that apply.)



Bases: Students Ages 18-21 n=1,841; 25 and Above n=2,928

THANK YOU!

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



For more information:

**Thomas Roth,
President and Founder**

584 Castro St. #834
San Francisco, CA 94114

Tel +1 415/437-3800

Fax +1 415/552-5104

Tom@CommunityMarketingInc.com

www.CommunityMarketingInc.com

*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.