



LGBT Market Research +
Development Lab™

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NGLCC and CMI Survey on LGBT Commerce

Thomas Roth, President
Community Marketing, Inc.

Today's Discussion



CMI's 5th Annual LGBT Community Survey

– A few top line findings



NGLCC/CMI LGBT Commerce Study

– A few points from the recent survey update

2011 LGBT Community Survey



 Community Marketing, Inc.

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U.S. Overview Report

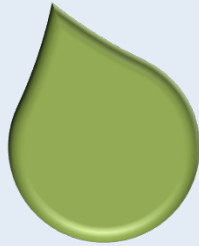
5th Annual
Edition





CMI's 5th Annual LGBT Community Survey

Thanks to our 2011 Sponsors



CMI's 5th Annual LGBT Community Survey is one of the most comprehensive studies available focusing on LGBT consumers.

Who Did We Talk To?



- Over 30,000 total respondents across more than 100 countries
- This report focuses on U.S. data for more than 10,000 self-identified gay men and 3,400 lesbian women
- Respondents were recruited from CMI's proprietary research panel and 150 LGBT media outlets and partner organizations
- Survey results on non-U.S. data and for bisexual and transgender respondents are available upon request



How Did We Talk To Them?



- 15 minute online survey conducted in May -June 2011
- Our survey was made available through an email invitation to survey panelists, as well as on the websites, email lists and social media of our 150+ 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.

In partnership with Rivendell Media, CMI's 2011 LGBT Community Survey respondents were referred from 150 LGBT media partners, events and organizations.



- 103.9 PROUD FM
- 365gay.com
- Adelante Magazine
- Advocate.com
- Affirmations
- afterellen.com
- afterelton.com
- Arizona Pride Guide
- Art & Understanding Magazine
- Autostraddle
- Avalon Media
- Baltimore OUTloud / Pride Media
- Bay Area Reporter
- BARTab SF
- Bay Windows
- Best Gay Cities
- Between the Lines
- Bey-Clarke Media Group
- Bisexual Resource Center
- Black & Blue Festival, Montreal
- Bleu Magazine
- Camp Magazine
- Canadian Gay and Lesbian Chamber of Commerce
- CenterLink: The Community of LGBT Centers
- Community Marketing, Inc.
- Compete Magazine
- Curve Magazine
- Dallas Voice
- Damron Gay Travel Guides
- Delta Foundation of Pittsburgh
- Divers/Cite Montreal
- DNA Magazine Australia
- dot429
- Echelon Magazine
- Echo Magazine / ACE Publishing
- EDGE Media Network
- Erie Gay News
- Examiner.com
- fab
- fabmagazine.com
- Frameline
- Frontiers Magazine
- Fun Magazine
- GA Voice, The
- GAIRE
- Gay Ad Network
- Gay Belfast
- Gay Chicago Magazine
- Gay City News
- Gay Life/ Gay and Lesbian Community Center of Baltimore
- Gay San Diego
- GAY to Z Directory
- gay.com
- GayCities
- Queerty
- gaydar
- Gaypedia
- Gayvan.com Travel Marketing
- GayWhistler
- Gayyellow.com
- GenreLatino
- Gloss Magazine
- Grindr
- guidemag.com
- Here Media
- HIVplus.com
- Hotspots Magazine
- Instinct Magazine
- ION Arizona Magazine
- Just Out Newspaper
- LA PRIDE / Christopher Street West
- Las Vegas Pride (SNAPI)
- Lesbian News
- LGBT Community Center (NYC)
- LOGOonline
- Logotv.com
- Mark's List
- Media Out Loud
- Metro Weekly
- Metropolitan Charities
- Metrosource Magazine
- Montrose Counseling Center
- Montrose Star
- My Scene City
- Mykonos Gay Guide
- New Mexico GLBTQ Centers
- New Mexico Pride Guide
- NEXT Magazine
- noiZe Magazine / Circuit Noize
- North Texas GLBT Chamber
- OMG! Magazine
- One More Lesbian
- OneGoodLove
- Our Scene TV
- Our Lives Magazine
- Out & About Newspaper
- Out Front Colorado
- Out in America Cities Network
- Out In Jersey Inc.
- Out on the Coast magazine
- Out.com
- Outlook Media Inc
- Outlooks Magazine
- OutServe
- OutSmart Magazine
- OutTraveler.com
- Outword Magazine
- Philadelphia Gay News
- Pink Banana Media
- Pink News UK
- Pittsburgh's Out
- Pride Life
- Pride London
- Pride March Victoria
- Purple Dragon
- Pride Source Media Group
- Q Center
- Q Guide
- Q Magazine
- Q-Notes
- QSanAntonio.com
- QUEERTimes.net
- QVegas Magazine
- QX Publishing
- Rage Monthly, The
- Rainbow High Vacations
- Rainbow Times
- Rivendell Media
- San Diego LGBT Weekly
- Social House Media Group
- South Florida Gay News.com
- Spartacus International Gay Guide
- spartacusworld.com
- squirt.org
- Staten Island LGBT Community Center
- Stonewall Columbus/ Columbus Pride
- Sweet
- TAG Approved Accommodations
- Telluride Gay Ski Week
- thegayplaces.com
- Three Dollar Bill Cinema
- Tom on Tour
- Towleroad / ModUrbanMedia
- TripOutGayTravel.com
- Washington Blade
- Watermark Media, Inc.
- Windy City Times
- Wisconsin Gazette
- Xtra! Ottawa
- Xtra! Toronto
- Xtra! Vancouver
- Xtra.ca



1

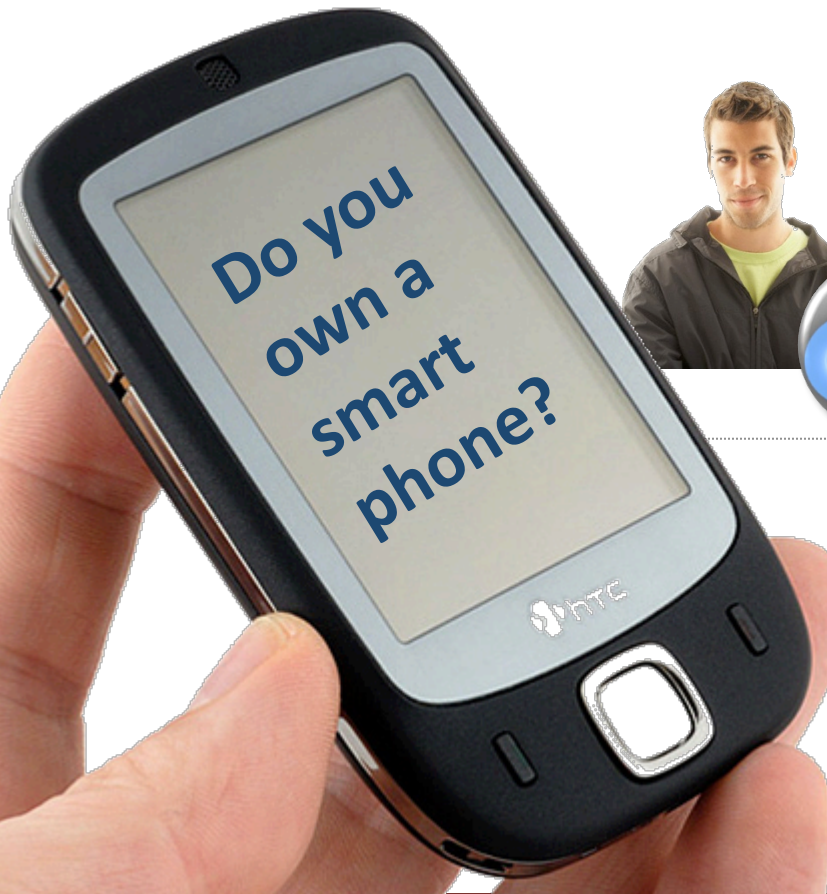
How are LGBT consumers interacting with technology?

Smartphones, Social Media and Influencers on Purchase Habits

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Smartphone Ownership

- Nearly 7 in 10 gay men own a smartphone – slightly higher than gay women
- iPhone ownership is a bit higher among gay men



68%



60%



iPhone



Android



Blackberry

33%

20%

9%

20%

23%

11%

Base: Gay Men n=10,019; Lesbians n=3,427

Technology & Social Interaction

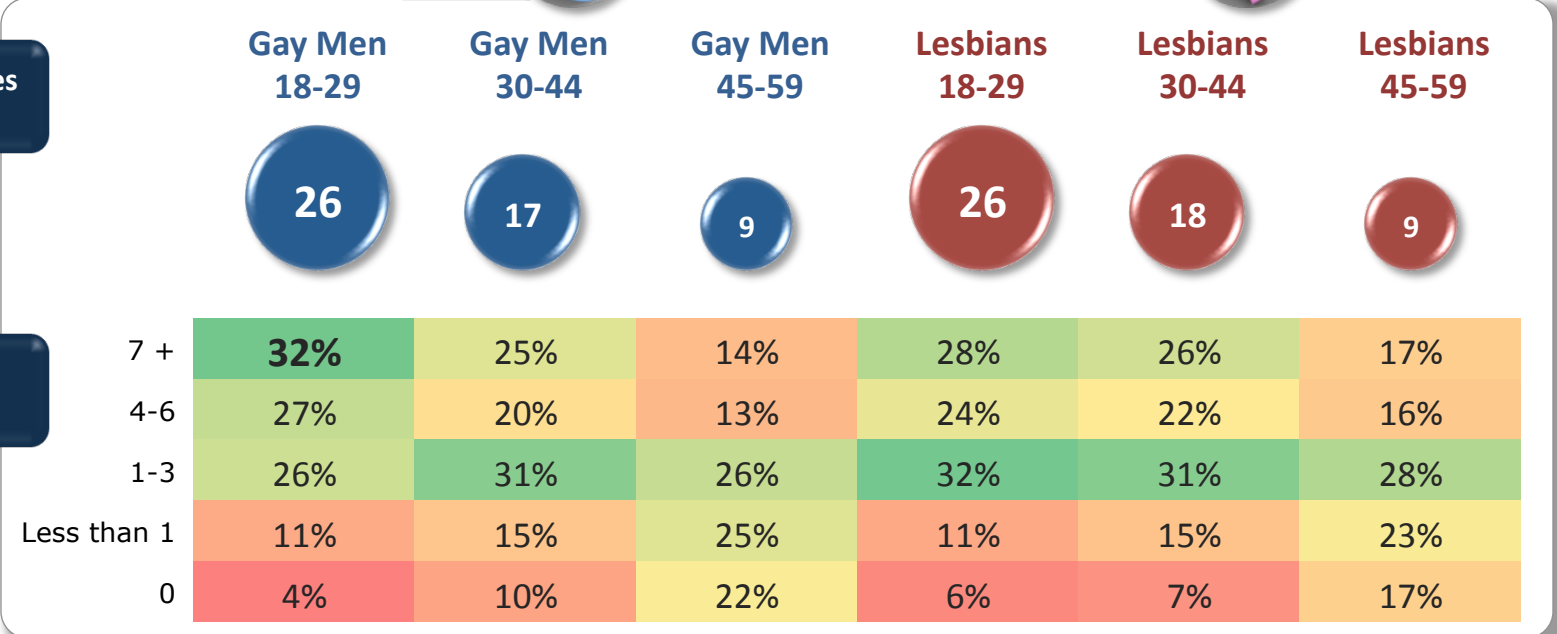
- Younger gay men and women are much heavier users of technology for socializing with their networks
- They send nearly twice as many texts per day as age 30+ and about a third spend at least an hour per day on Facebook



Average Text Messages Sent Per Day



Average Hours on Facebook Per Week



Base: Gay Men 18-29 n=1,562, 30-44 n=2,993, 45-59 n=3,779; Lesbians 18-29 n=588, 30-44 n=1,113, 45-59 n=1,185

The LGBT World is on Facebook

- Everyone uses Facebook primarily to facilitate connections, but younger gay men and women are more likely to also see it as a source of ‘entertainment’

What do you use Facebook for?



	Gay Men 18-29	Gay Men 30-44	Gay Men 45-59	Lesbians 18-29	Lesbians 30-44	Lesbians 45-59
Re-connecting with old friends	89%	89%	85%	92%	93%	88%
Entertainment	62%	54%	36%	57%	52%	36%
Meeting new friends	57%	50%	38%	44%	42%	34%
Other	27%	26%	30%	26%	25%	31%
Online gaming	15%	17%	10%	18%	18%	16%
Dating	14%	8%	4%	5%	3%	1%

Base: Gay Men 18-29 n=1,562, 30-44 n=2,993, 45-59 n=3,779; Lesbians 18-29 n=588, 30-44 n=1,113, 45-59 n=1,185

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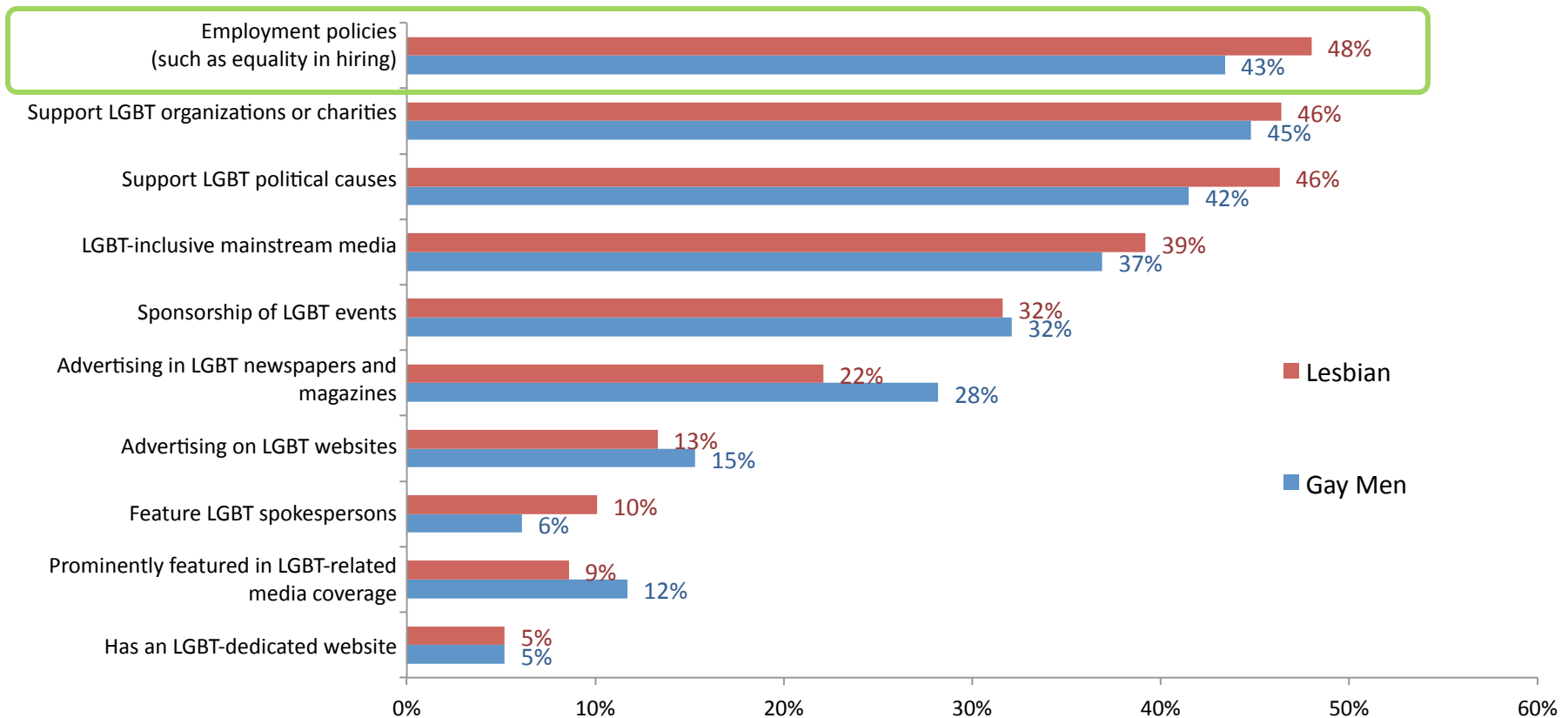
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LGBT Outreach

- Equality in the workplace and support of LGBT charities and political causes have the most impact on gay consumers' buying decisions; more niche methods such as dedicated LGBT websites and spokespeople appear to be less effective

Which approaches have the biggest impact on influencing your purchasing decisions?

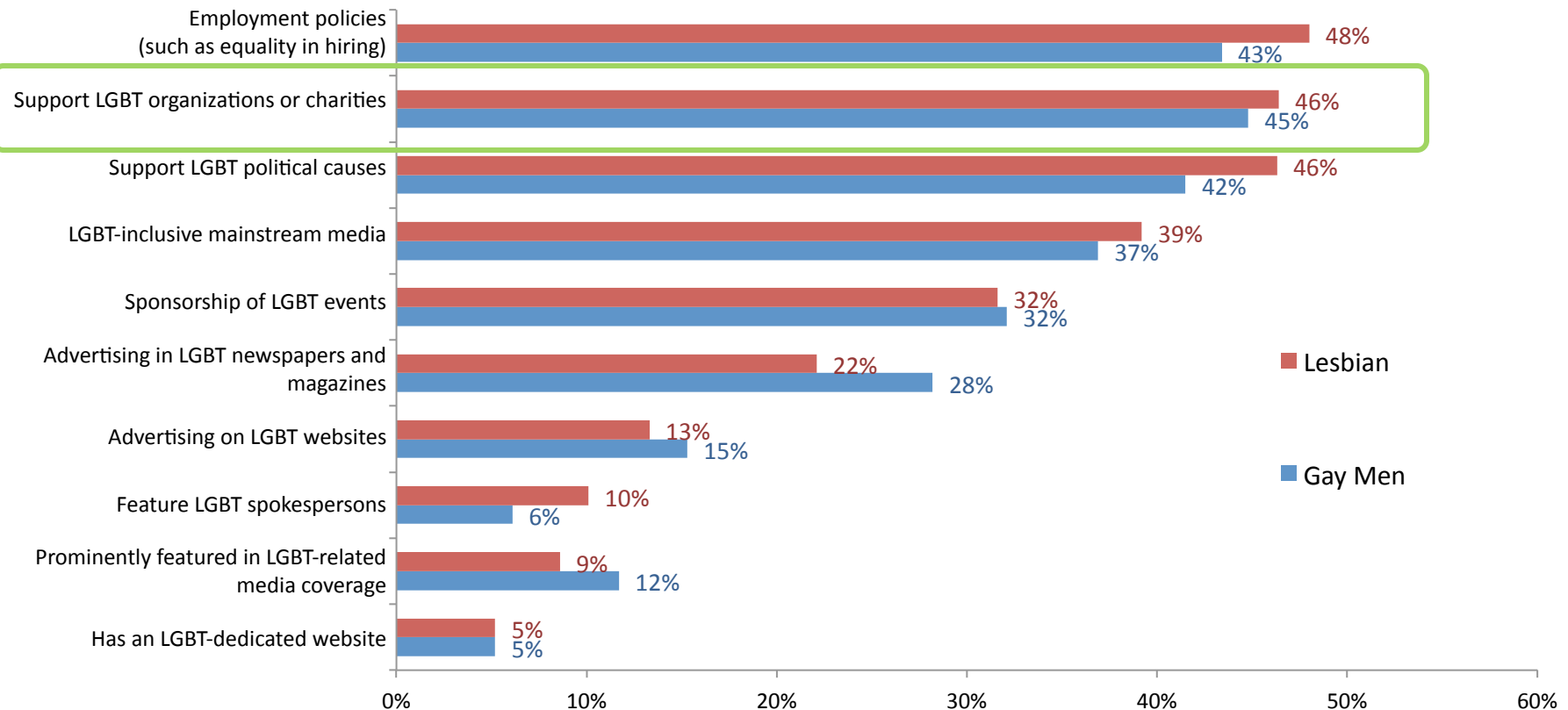


Base: Gay Men n=10,019; Lesbians n=3,427

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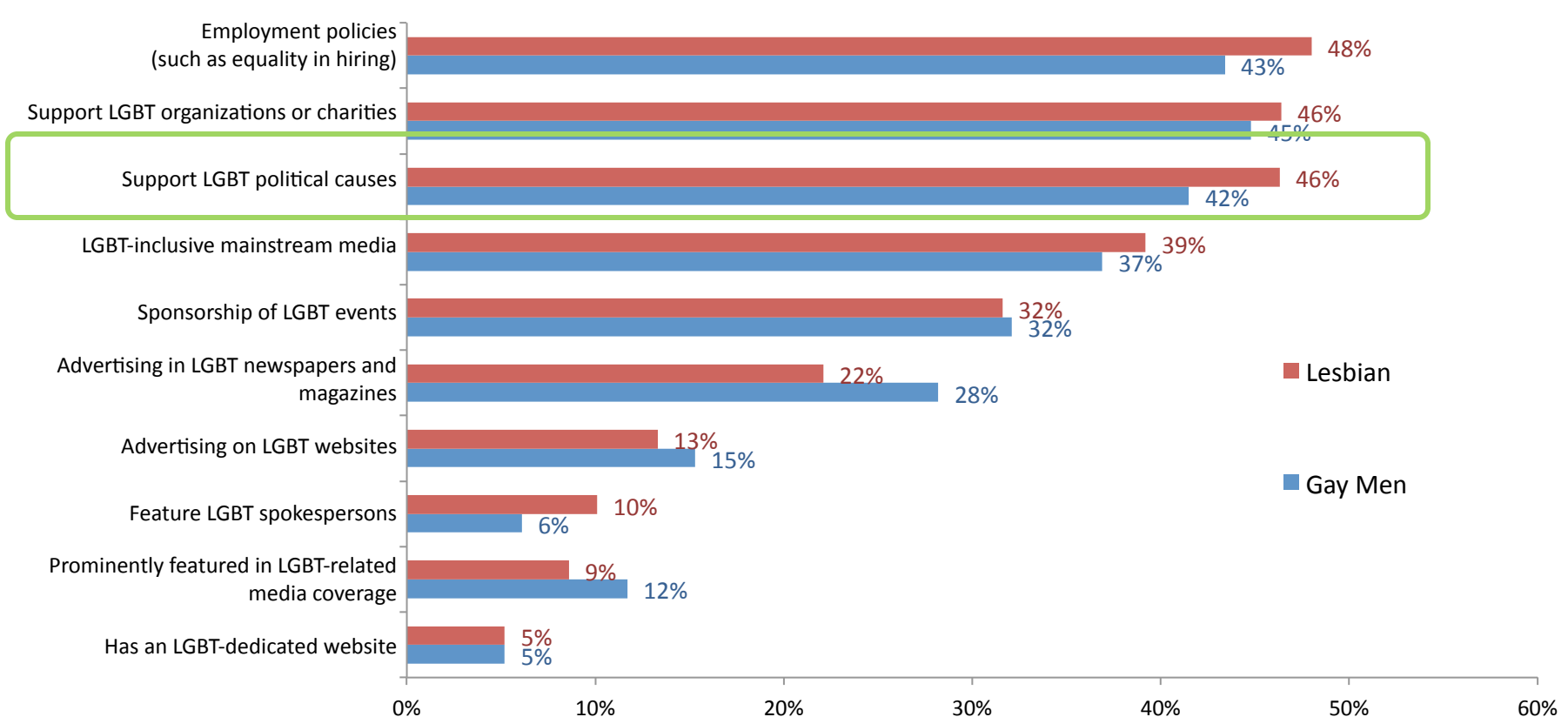


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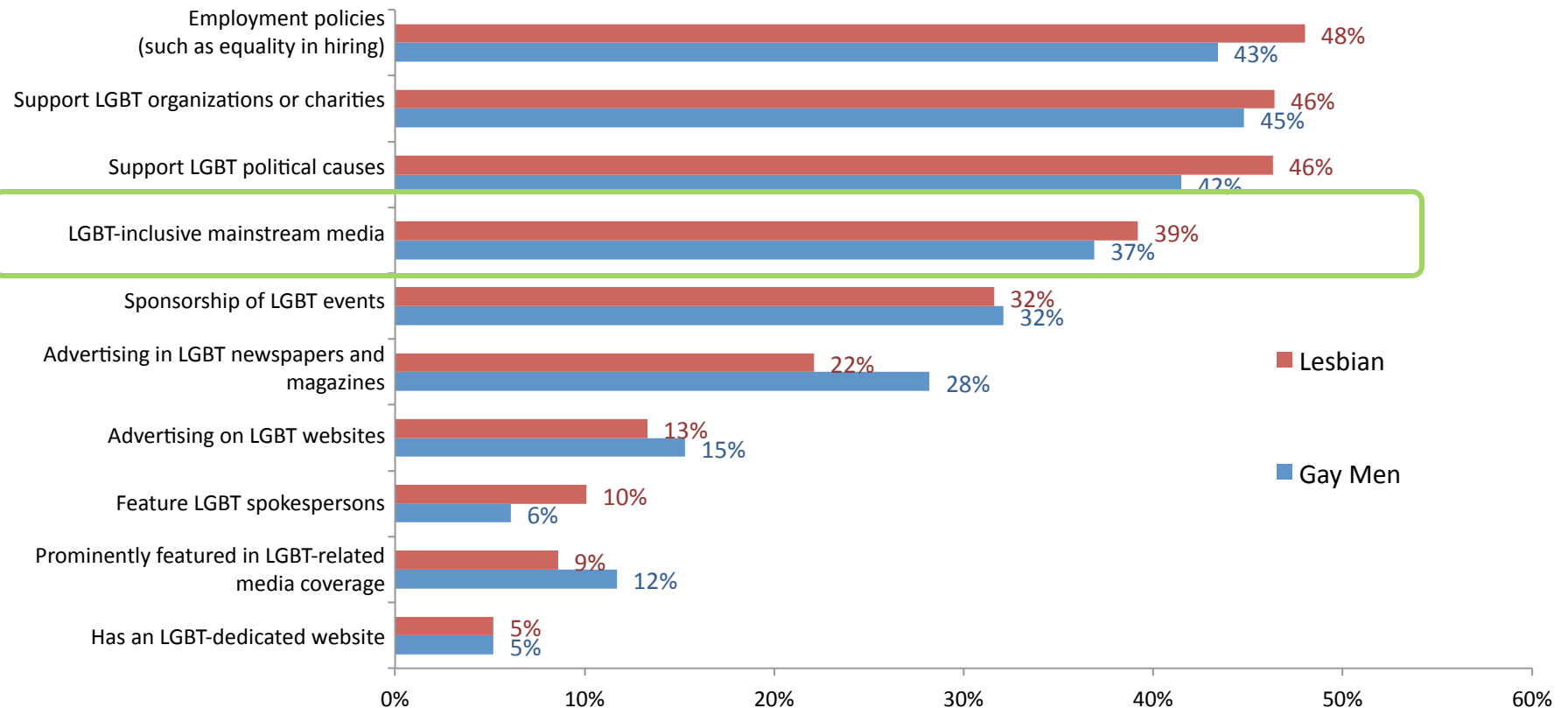


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LGBT Outreach



LGBT Outreach: LGBT-inclusive mainstream media



LGBT Outreach



STICK AROUND.
THINGS GET INTERESTING.

Regular mammograms are just the ticket. We have one of the highest breast screening rates in the nation. That's how we know they really do help you live long and thrive. So you want to know how the story of your family unfolds? Book your mammogram today and stick around — things are going to get a whole lot more interesting. Learn more at kp.org/thrive

KAISER PERMANENTE **thrive**

LGBT Outreach



LGBT Outreach

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KAISER PERMANENTE **thrive**

LGBT Outreach: LGBT-inclusive mainstream Media

Time Magazine



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KAISER PERMANENTE **thrive**

LGBT Outreach: LGBT-inclusive mainstream Media

J Crew

SATURDAY
with jenna

See how she and son Beckett go off duty in style.





quality time

"Lucky for me, I ended up with a boy whose favorite color is pink. Toenail painting is way more fun in neon."

© Jcrew.com



HAPPY TOGETHER
OUR DESIGNER SOMSACK AND HIS BOYFRIEND, MICAH.

Diversity within LGBT: Exploring differences by ethnic segments.

A few highlights

- Gay Asian men tend to be the most ‘tech-forward’ audience – they are much more likely to be smart phone users (84% vs. 68% average) and over 1 in 4 have already purchased a tablet computer
 - They are also the most likely to use their smartphones for activities such as navigation (74%) and playing games (66%)
- While the purchase habits of all LGBT consumers are clearly affected by a company’s gay friendliness, Latinos/Latinas tend to be particularly influenced by equality in hiring while Asians focus more on political and charitable causes
- When it comes to media usage, readership of regional/local LGBT print publications tends to be slightly higher among African Americans, while Asian gay men and women are somewhat more likely to read LGBT blogs



2



What they are buying?

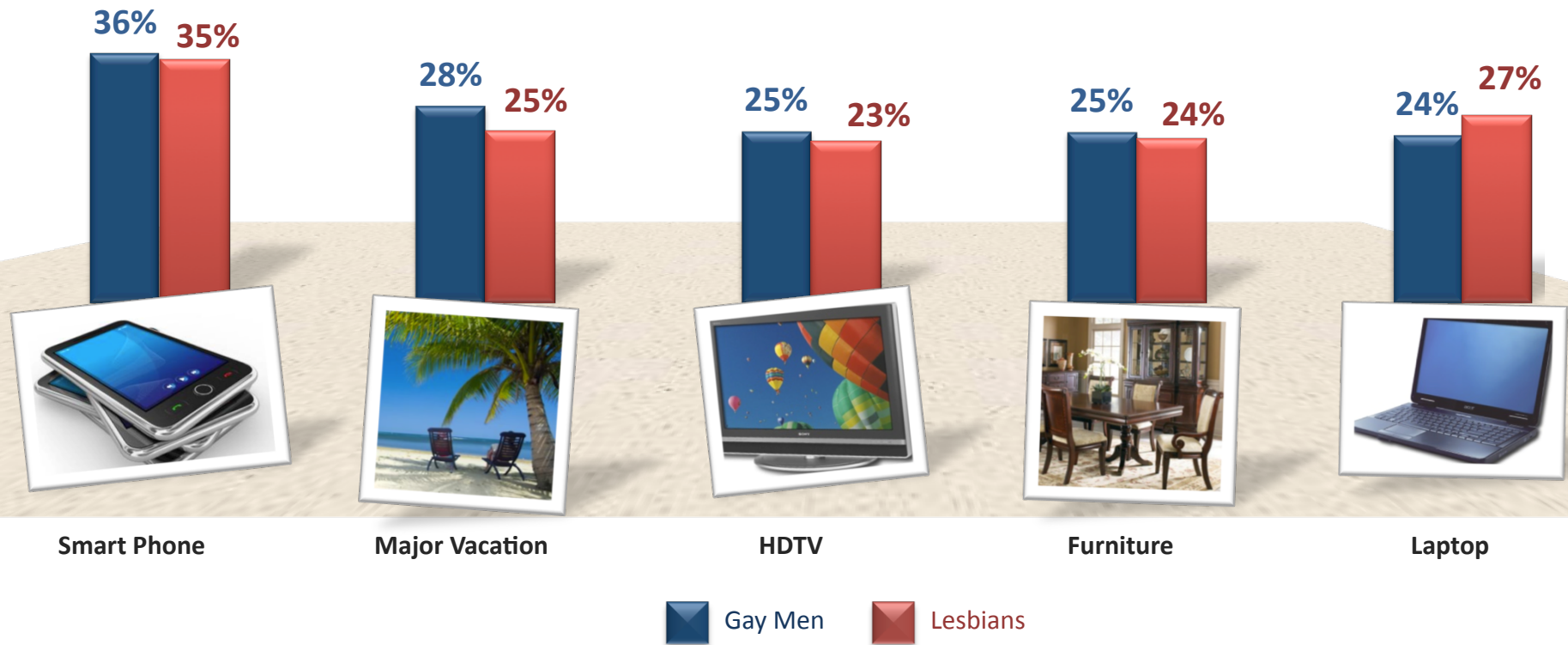
Past Year & Planned Future Purchases

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Past Year Purchases

- Over a third of gay men and women have purchased smartphones in the past year
- And about 1 in 4 have gone on a major trip or bought an HDTV, home furniture or laptop

Top 5 Purchases, Past Year



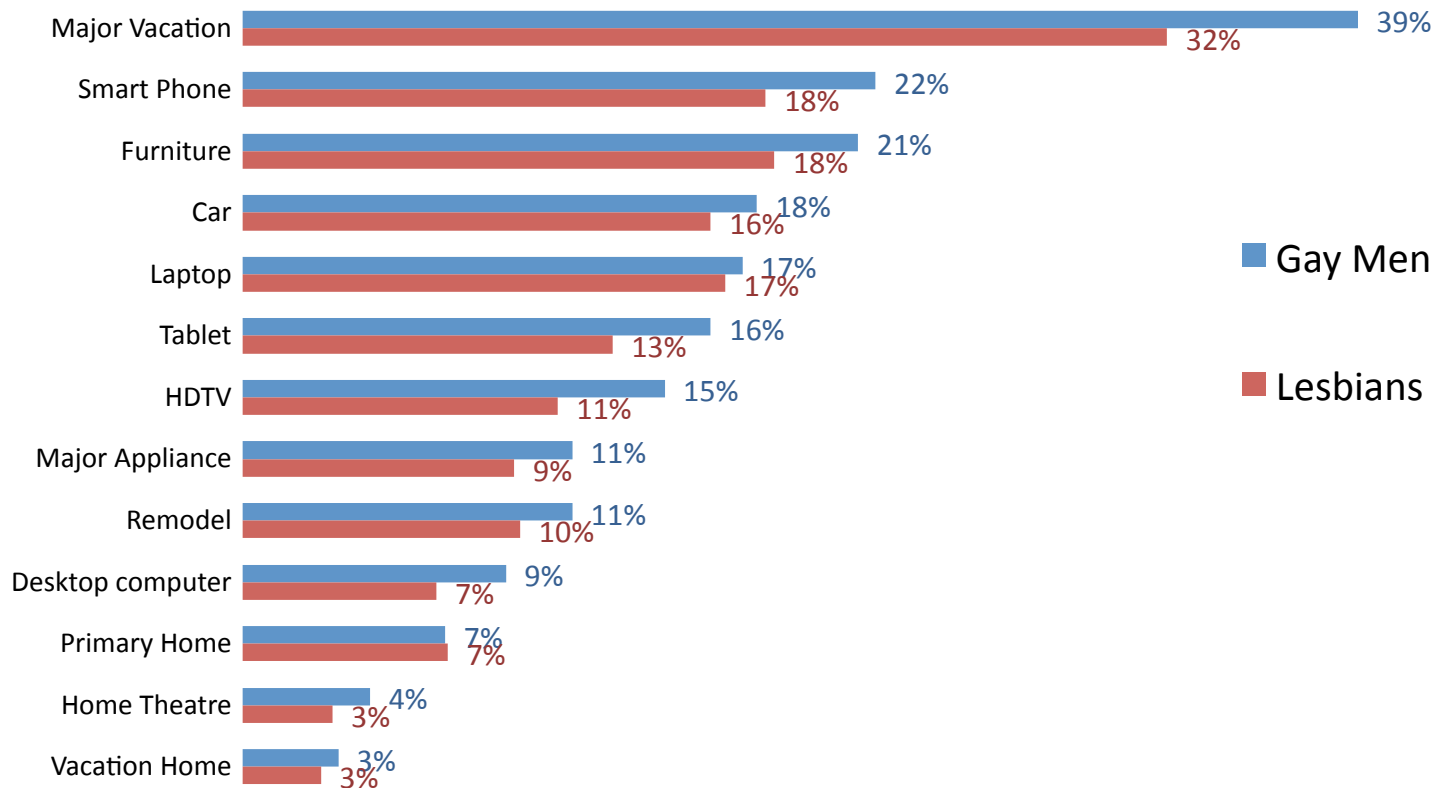
Base: Gay Men n=10,019; Lesbians n=3,427

Planned Purchases

- Travel is a big ticket purchase being planned by many gay men and women in the coming year
- Other popular major purchases being planned include cars and tablet computers



Which of the following do you plan to purchase in the next 12 months?



Base: Gay Men n=10,019; Lesbians n=3,427



3

How do you reach them most effectively?

Media Usage & Interaction With Advertising

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Media Consumption

- Interestingly, LGBT focused websites are nearly as popular as mainstream sites across all groups

In the past week, have you read, viewed, or listened to...?

	Gay Men 18-29	Gay Men 30-44	Gay Men 45-59	Lesbian 18-29	Lesbian 30-44	Lesbian 45-59
Mainstream Internet sites	69%	69%	63%	61%	61%	58%
LGBT Internet sites	61%	57%	58%	63%	50%	43%
Network/cable television	60%	68%	67%	56%	59%	65%
Mainstream general newspapers	51%	55%	64%	41%	52%	60%
Streaming video (TV, movies) on computer	50%	38%	27%	43%	30%	20%
LGBT blogs	43%	33%	26%	40%	26%	17%
Mainstream magazines	38%	43%	40%	29%	35%	34%
Mainstream radio	36%	39%	38%	36%	43%	41%
LGBT magazine	36%	43%	43%	33%	36%	33%
LGBT publications for my city/region	33%	43%	48%	33%	39%	42%
LGBT mobile apps	31%	26%	14%	6%	3%	2%
Mainstream blogs	29%	23%	16%	23%	17%	11%
Mainstream alternative newspapers	22%	26%	30%	22%	29%	29%
Satellite radio	13%	19%	18%	10%	13%	14%
LGBT radio	10%	13%	11%	6%	8%	8%

Base: Gay Men 18-29 n=1,562, 30-44 n=2,993, 45-59 n=3,779; Lesbians 18-29 n=588, 30-44 n=1,113, 45-59 n=1,185

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Media Consumption

- Interestingly, LGBT-focused websites are nearly as popular as mainstream sites across all groups
- Don't neglect the "traditional" print LGBT media, a resource we still very much depend on. And LGBTs have special appreciation for advertisers who support these media with ads.

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Learning About News & Events

- When it coming to finding out about the things that matter, the ubiquity of Facebook is apparent – especially in the lives of gay and lesbian consumers under 30
- Facebook tops mainstream media among gay men and women 18-29 as a source of news and events; and, Twitter is particularly strong among these groups as well

How do you typically find out about news stories or events that are relevant to you?



	Gay Men 18-29	Gay Men 30-44	Gay Men 45-59	Lesbians 18-29	Lesbians 30-44	Lesbians 45-59
Friends on Facebook	70%	59%	38%	72%	66%	49%
Mainstream press /websites	62%	65%	68%	54%	60%	64%
LGBT press/websites	48%	47%	47%	56%	47%	44%
Search Engine	35%	33%	30%	34%	31%	32%
Twitter or text from friends	33%	19%	8%	29%	18%	10%
Email newsletters	24%	26%	32%	30%	32%	38%
Google News	24%	21%	17%	22%	18%	17%
Yahoo! News	20%	27%	25%	27%	27%	26%

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Twitter or text from friends	33%	19%	8%	29%	18%	10%
Email newsletters	24%	26%	32%	30%	32%	38%
Google News	24%	21%	17%	22%	18%	17%
Yahoo! News	20%	27%	25%	27%	27%	26%






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Interaction with Advertising

- Facebook advertising is rivaling traditional website banner ads among all LGBT consumer groups
- And, among younger gay men, emerging ad platforms such as 'QR codes/tags' and mobile apps are gaining traction

In the past week, have you... ?



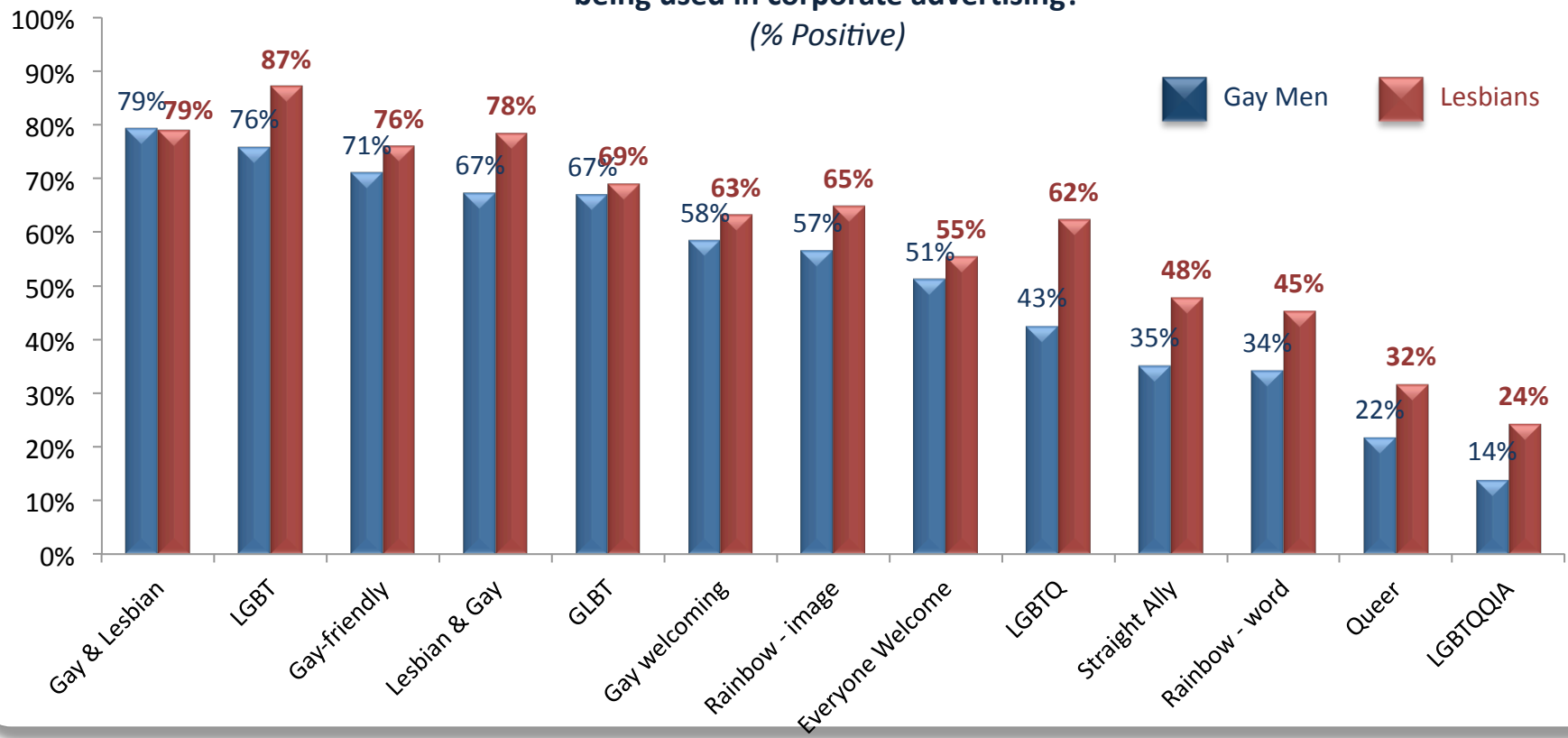
	Gay Men 18-29	Gay Men 30-44	Gay Men 45-59	Lesbians 18-29	Lesbians 30-44	Lesbians 45-59
 Clicked on a website banner ad	35%	32%	35%	33%	22%	24%
 Clicked on a Facebook ad	31%	32%	31%	30%	30%	30%
 Scanned a "tag" with smartphone	21%	20%	10%	10%	11%	7%
 Clicked on a mobile app ad	19%	16%	11%	8%	9%	7%
 Forwarded an ad to a friend	12%	14%	13%	11%	12%	11%

Base: Gay Men 18-29 n=1,562, 30-44 n=2,993, 45-59 n=3,779; Lesbians 18-29 n=588, 30-44 n=1,113, 45-59 n=1,185

Response to LGBT Terms in Corporate Marketing

- 'Gay & Lesbian' and 'LGBT' are the most preferred terms used in corporate marketing
- Lesbians have more positive opinions of several other terms including 'LGBTQ' and 'Straight Ally'

What is your opinion of each of the following terms being used in corporate advertising?
(% Positive)



Base: Gay Men n=10,019; Lesbians n=3,427

2011 NGLCC & CMI Survey

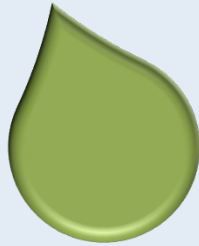
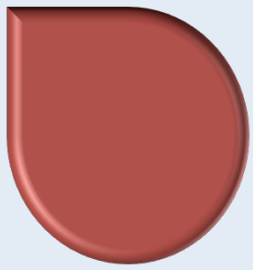


*An Update on LGBT Business to Business
Commerce in the U.S.*

 **Community Marketing, Inc.**

**LGBT Market Research +
Development Lab™**

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2011 LGBT Commerce Survey

Thanks to our 2010 and 2011 Sponsors



About NGLCC



The NGLCC is the business advocate and direct link between LGBT business owners, corporations and government. The NGLCC represents the interests of more than 1.4 million LGBT-owned businesses in the United States and is the umbrella organization for 61 state, local and international LGBT chambers of commerce and business organizations.

About Community Marketing, Inc.

LGBT Market Research +
Development Lab™



- San Francisco-based, LGBT Owned/Operated company founded in 1992 serves clients throughout the USA, Canada, Europe, Australia and Japan
- 18+ years of consumer research, strategic consulting, marketing planning, communications, and training services
- Conducted the research and provided strategic consulting for leading brands, including MetLife, Wells Fargo Bank, Union Bank; Gallo Wineries, ABSOLUT, Miller/Coors; Hyatt, Starwood and Kimpton Hotels, LA Inc., Travelocity; plus the Chicago History Museum, the US Census Bureau, US Department of Housing & Urban Development *and many more...*

2011 LGBT B2B Commerce Update



The goal of the study was to quantify and qualify the purchasing habits, motivations and behaviors of LGBT-owned companies and LGBT-friendly corporations, and determine the opportunities for increasing LGBT-related B2B commerce.

Who Did We Talk To?



- Over 4,000 U.S. respondents
- Respondents were recruited from:
 - CMI's proprietary research panel CMI's proprietary research panel of 50,000 LGBT community members (pre-qualified as "business decision makers")
 - NGLCC national members and members of regional affiliated LGBT Chambers of Commerce



How Did We Talk To Them?

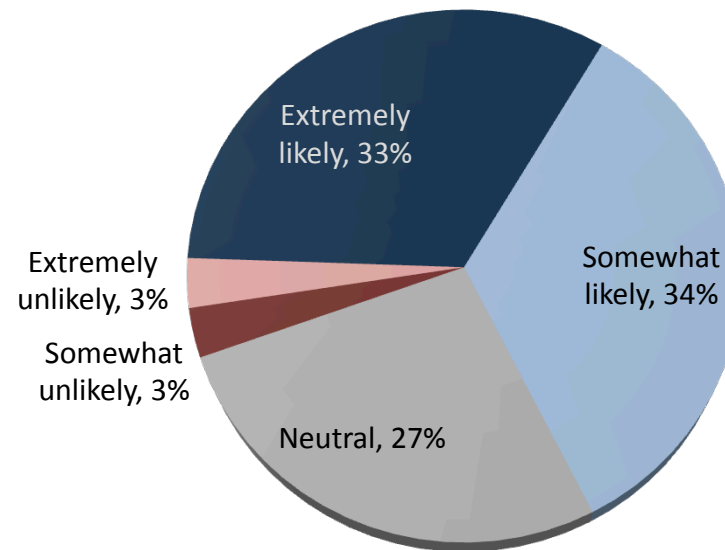


- 15 minute online survey conducted in June, 2011
- Our survey was made available through a secure email invitation to survey panelists and NGLCC members
- All respondents were employed or self-employed at the time of the survey
- Results are compared to 2010 data where applicable

The vast majority of decision-makers are likely to give preference to LGBT-owned/LGBT-friendly vendors when purchasing at work

- Lesbians are slightly more likely than gays to give preference to LGBT-owned/LGBT-friendly vendors (39% were extremely likely, compared with 32% of gays)
- Nearly half of owners (47%) are extremely likely to give preference to such vendors

Likelihood of Giving Preference to
LGBT-owned/LGBT-friendly vendors
2011

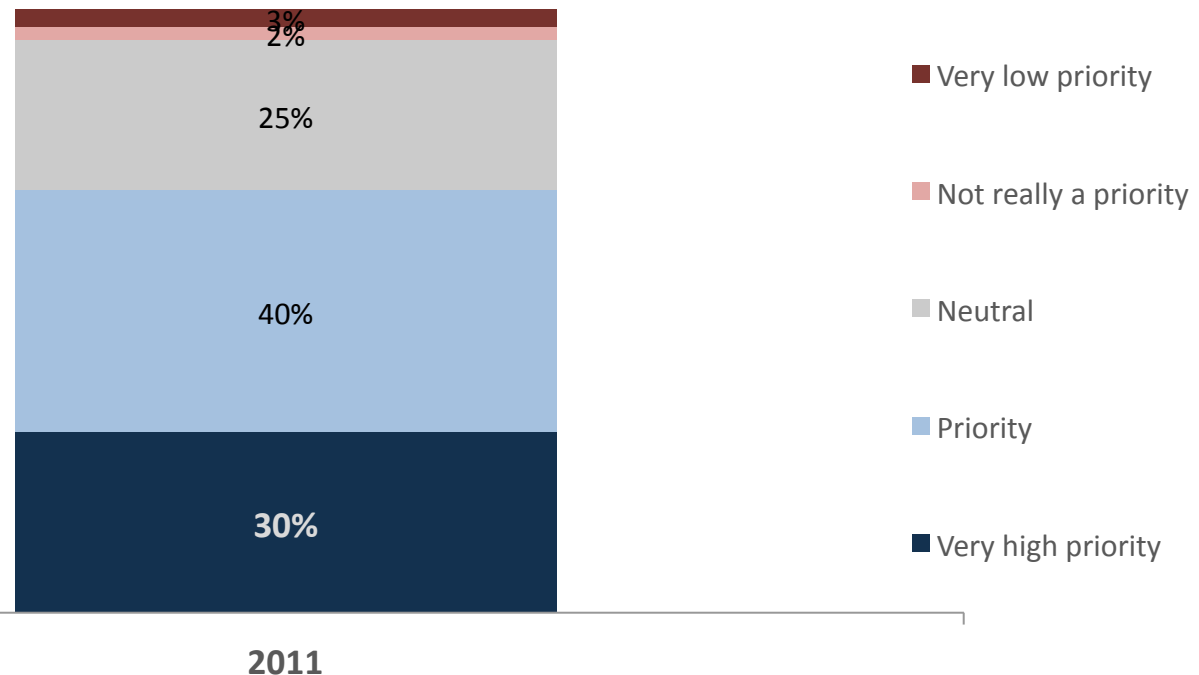


Q13. When purchasing at work, how likely are you to give preferences to and/or select hotels, banking, insurance, office supply and other vendors because they are known to be LGBT owned or LGBT-friendly? Base: Business decision-makers/influencers (n=1151)

When it comes time to select a vendor, 70% of these decision-makers say that LGBT businesses get priority consideration

- Again, this is even stronger among business owners specifically (81%)

Priority Given to Select LGBT-owned and/or LGBT-friendly Vendors, Once Identified

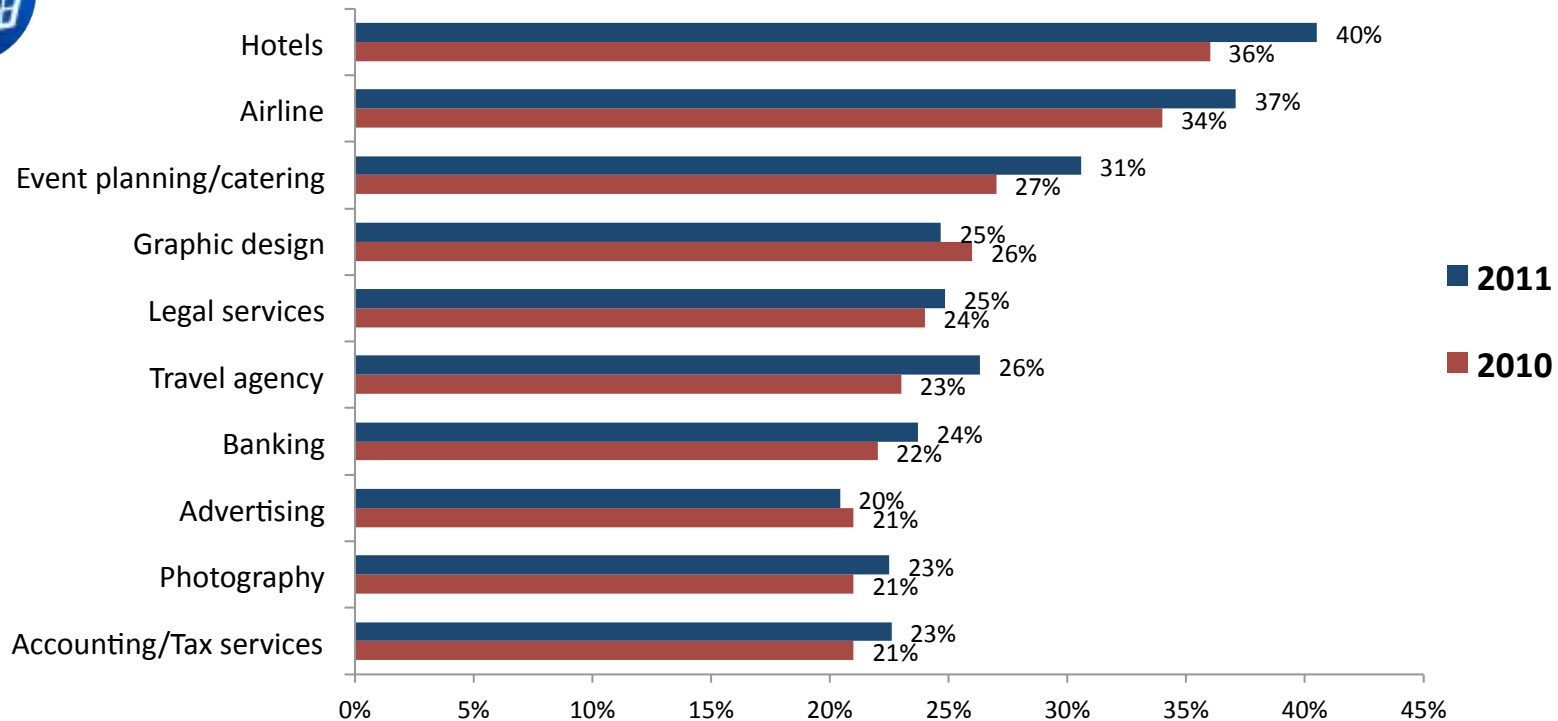


Q. Once you have identified LGBT-owned and/or LGBT-friendly vendors, how much of a priority do you make to select them, all else being equal?

Base: Business decision-makers/influencers (2011 n=1151)

Compared to just last year, more decision-makers are purchasing from LGBT businesses across a range of categories

What products and services has your company done business with and/or sourced from LGBT-friendly vendors in the past year?

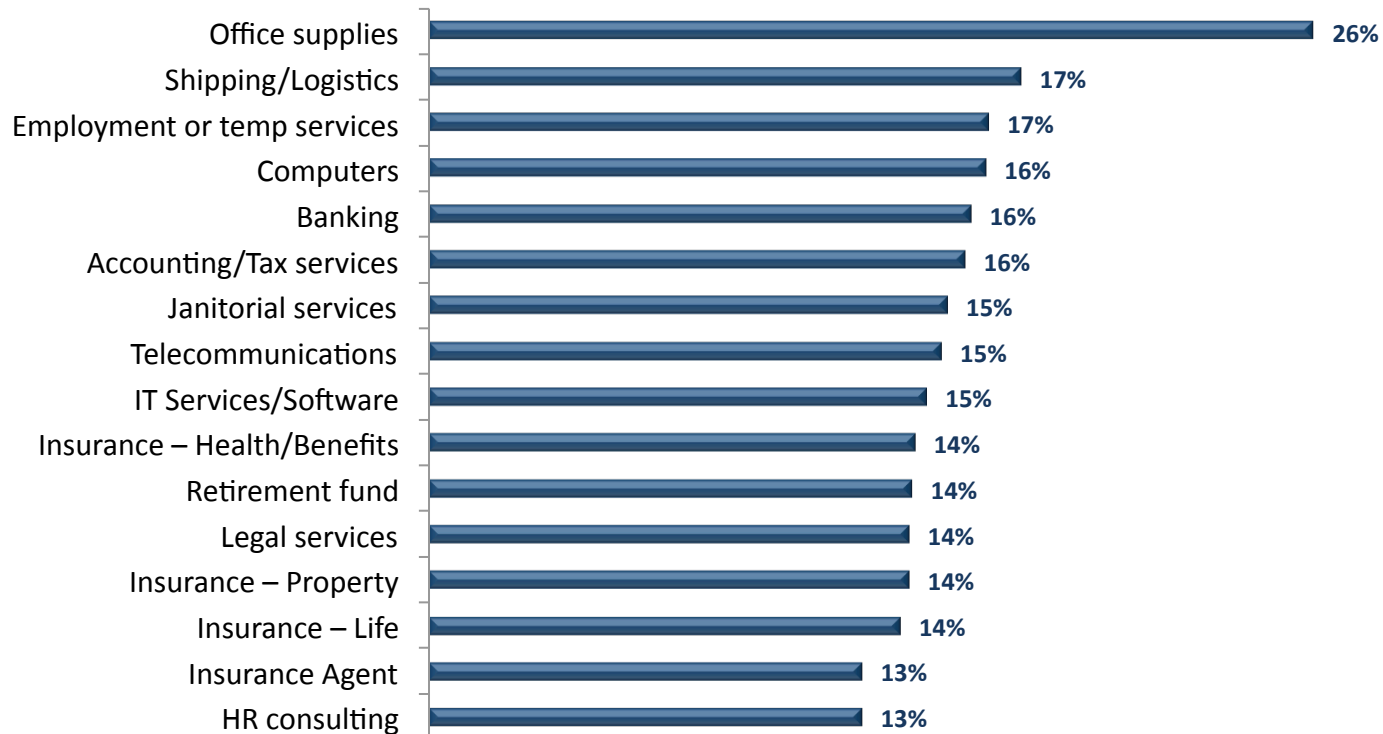


Q17. For the purchases you personally control, what products/services has your company done business with and/or sourced from LGBT-friendly vendors in the past year?
Base: Business decision-makers/influencers (2011 n=1151)

And demand exists for a large variety of other products and services from LGBT businesses. *NGLCC can meet that need.*



Tried, But Could Not Find LGBT-Friendly Option 2011



Q. For the purchases you personally control, what products/services has your company done business with and/or sourced from LGBT-friendly vendors in the past year? Base: Business decision-makers/influencers (2011 n=1151; 2010 N=1152)

Free Download:

www. L G B T b 2 b .com

This presentation

5th Annual LGBT Community Survey

Thanks to our Survey Partners for your Support!

This important study would not have been possible without you.



To sponsor the
2012 Study, with an
opportunity to ask
proprietary questions,
contact

Victoria Fulkerson
vfulkerson@nglcc.org

Connect with us to learn even more...
www.CommunityMarketingInc.com



Thank you!

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

ABOUT COMMUNITY MARKETING, INC.

The facts are plain: As a niche market segment, gay men and lesbians have a significant amount of disposable income. Most critically, their dollars go to product and service suppliers that recognize their unique buying motivations and preferences, and offer them differentiated value.

Community Marketing, Inc. has been helping a wide variety of industry leaders master the subtleties of this market **since 1992**. Our unique and specialized services are based on over 18 years of experience and case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), with our proprietary panel of 60,000+ LGBT consumers; strategic consulting; marketing planning, and marketing plan implementation/management. We produce custom, on-site training sessions, develop conferences, symposia and webinars, and speak at industry events.

Whether your organization is just learning about the market or is updating its strategy, Community Marketing can accelerate your plans, reduce your risks and deliver **measurable** results. Because the LGBT community comprises a “slice” of the world’s population, there is no singular “gay market.” You’ll find singles, couples and families in every ethnicity. And you’ll find a world of diverse interests. Community Marketing’s proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing, Inc. 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 gay and lesbian 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.

CMI’s LGBT Market Research + Development Lab® projects and training include:

- ABSOLUT (Pernod Ricard)
- Blue Cross/Blue Shield
- Chicago History Museum
- E. & J. Gallo Winery / Barefoot Wines
- Farmers Insurance
- Greater Philadelphia Tourism Marketing Corporation
- Hyatt Hotels & Resorts
- Japan Air Lines
- Japan National Tourism Organization
- Kimpton Hotels & Restaurants
- LA, Inc. (Convention & Visitors Bureau)
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- Prudential
- Starwood Hotels & Resorts
- Switzerland Tourism
- Travelocity
- U.S. Government (Census Bureau)
- U.S. Government (Housing & Urban Development)
- Wells Fargo Bank

And many others

CMI's LGBT Consumer Panel 2011

The facts are plain:

Gay men and lesbians own more homes and cars, travel more, spend more on electronics, and have **the largest amount of disposable income of any niche market**. And it's a sizeable niche: LGBT consumers make up 5% to 10% of the U.S. consumer market. Community Marketing will help you connect with this influential demographic.

CMI's LGBT Consumer Panel: What makes it unique?

- **Accurate, targeted market intelligence**

Utilizing quantitative and qualitative market research methodologies, Community Marketing 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 nearly 20 years in business, Community Marketing has developed a research panel of more than **60,000** 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, Inc. Experience & Expertise**

Since 1992, Community Marketing has provided market research, strategic consulting and marketing planning services to a wide variety of clients. We've provided LGBT consumer intelligence to numerous market leaders like Wells Fargo Bank, ABSOLUT, MetLife, MillerCoors, Japan Airlines and Hyatt Hotels, as well as the U.S. Government (Census Bureau and HUD). We've completed hundreds of custom quantitative and qualitative research initiatives for clients worldwide. We also present public and custom on-site educational seminars and workshops. In the past year, Community Marketing produced and presented at LGBT marketing symposia on four continents.

***Learn more on our website,
www.communitymarketinginc.com.***

60,000+

gay, lesbian, bisexual
and transgender consumers

47 median age

51% live with partner

71% college grads

84% currently employed

72% hhi >\$50K

60% own a home

88% own a car

40% drink wine at home
weekly

69% drink at bars
and restaurants

spend **\$100** at bars &
restaurants per week

37% make purchasing
decisions at work

67% are on facebook

12% blog daily

**Past 12 mo.
purchases**

automobile 19%

smart phone: 30%

laptop computer: 33%

hdtv: 27%

running shoes: 36%

primary home 6%

vacation home 2%

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's **LGBT Market Research + Development Lab®** 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, Inc. (CMI) has developed our proprietary consumer panel over the past 18+ 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*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *USA Today*, the *Wall Street Journal*, *Brand Week*, 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 60,000 qualified LGBT consumers, the largest of its kind, by far. Our 4th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 100+ 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 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, Mexico, Australia, Britain and Germany, 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 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, 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 CMI 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 18 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.