CMI Community Marketing & Insights
Community Marketing, Inc.

17th Annual LGBT Travel Survey

October 2012

About

CMI Community Marketing & Insights
Community Marketing, Inc.

- San Francisco-based, LGBT Owned/Operated company founded in 1992 serves clients throughout the USA, Canada, Europe, Australia and Japan
- 20+ years of consumer research, strategic consulting, marketing planning, communications, and training services
- Conducted research and provided strategic consulting for leading brands, including Prudential Financial, Wells Fargo Bank, Union Bank, Gallo Wineries, ABSOLUT, Miller/Coors, Hyatt, Starwood, Kimpton Hotels, LA Inc., Las Vegas CVA, Fort Lauderdale, Philadelphia, Stockholm Tourist Board, Switzerland Tourism, Japan National Tourism Organization, Travelocity; plus Prudential, Target Brands, American Cancer Society, Kaiser Family Foundation, the US Census Bureau, US HUD *and many more…*

17th Annual LGBT Travel Survey

Who Did We Talk To?

- These initial findings are based on responses from over 5,700 respondents in the U.S. collected as of October 2012
- Respondents were recruited from CMI's proprietary research panel .
- A chance of winning one of five $100 cash prizes was used as an incentive
- This summary focuses on only some of the highlights of this year's survey; contact us for in-depth results and custom analysis

How Did We Talk To Them?

- 15 minute online survey conducted in September - October 2012
- 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 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.

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17th Annual LGBT Travel Survey

Part 1:
LGBT Travel Coming Out of the Recession

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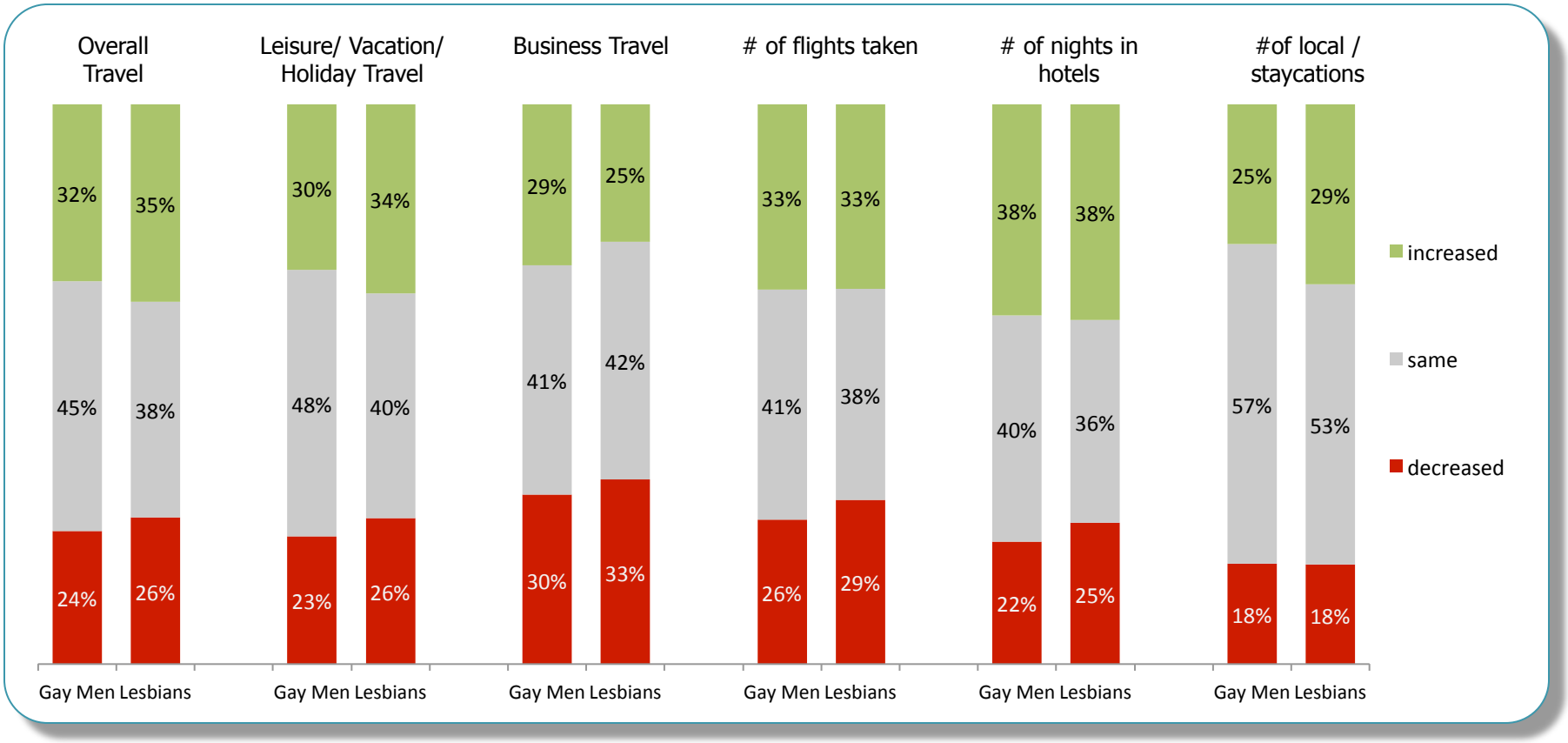
About a third of both gay men and lesbians *increased* their overall travel in the past year. The overall travel trend over the past 12 months was somewhat positive.

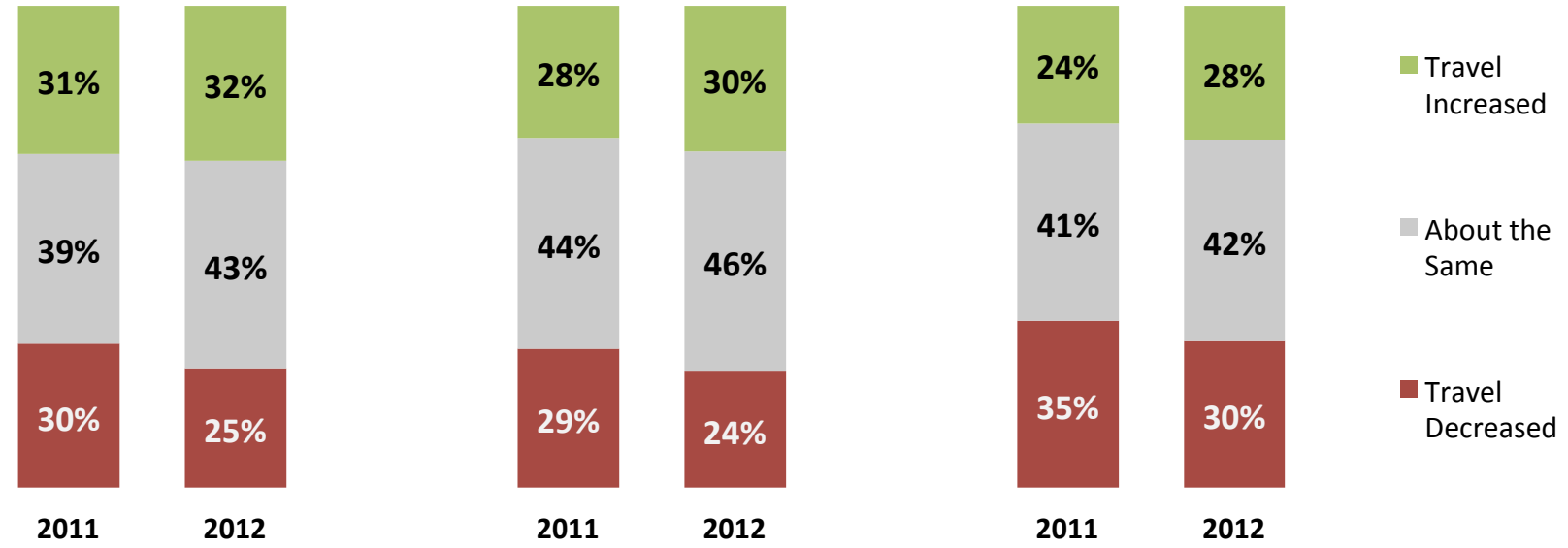
Travel in Past 12 Months vs. Prior Year



Comparing your travel during the past 12 months to your travel in the year before that, did you travel more, about the same, or less than the previous year?
Gay men n= 4,059; Lesbians n= 1,247

Comparing 2012 at 2011 results, LGBT travel seems to be slowly recovering over time since the start of the recession.

Travel in Past 12 Months vs. Prior Year



Comparing your travel during the past 12 months to your travel in the year before that, did you travel more, about the same, or less than the previous year?
Total US LGBT n=5,784

Overall, LGBT travel has increased by one trip in the past 12 months, compared to the 2011 survey results.

Average # Trips, Past 12 Months

	Gay men	Lesbians
LEISURE TRIPS	4.7	4.0
RT AIR FLIGHTS FOR LESIURE TRIPS	3.7	2.7
BUSINESS TRIPS	3.2	2.1

How many total trips did you take in the past 12 months, where you stayed in paid accommodations at least one night?
Total USA LGBT n=5,784; Gay men n= 4,059; Lesbians n= 1,247

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17th Annual LGBT Travel Survey

Part 2:
Travel Motivations, Trends & Frequency

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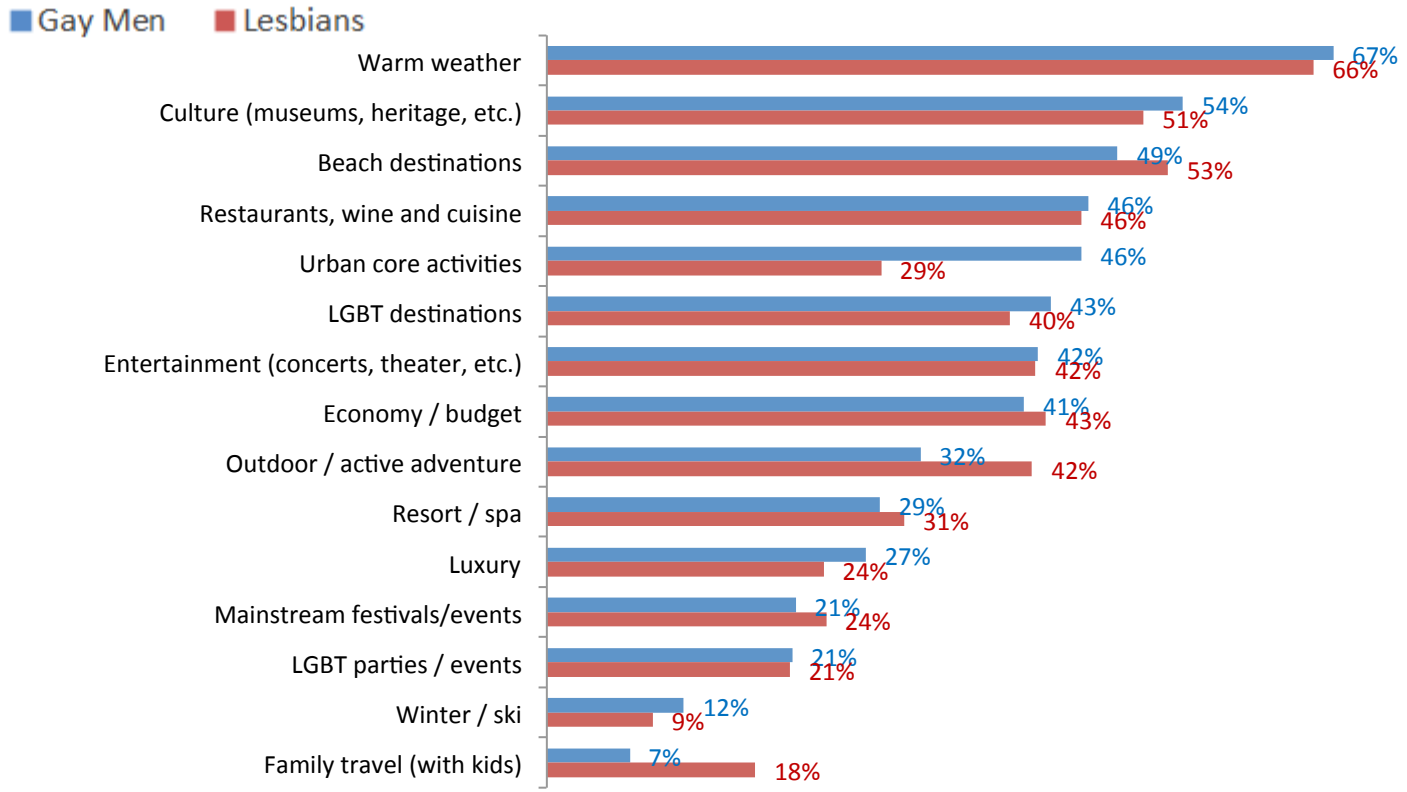
Kind of traveler? Two-thirds of LGBTs say they are warm weather travelers

- 'Urban core' travel is more associated with gay men
- More lesbians say they are into outdoor activities and family travel

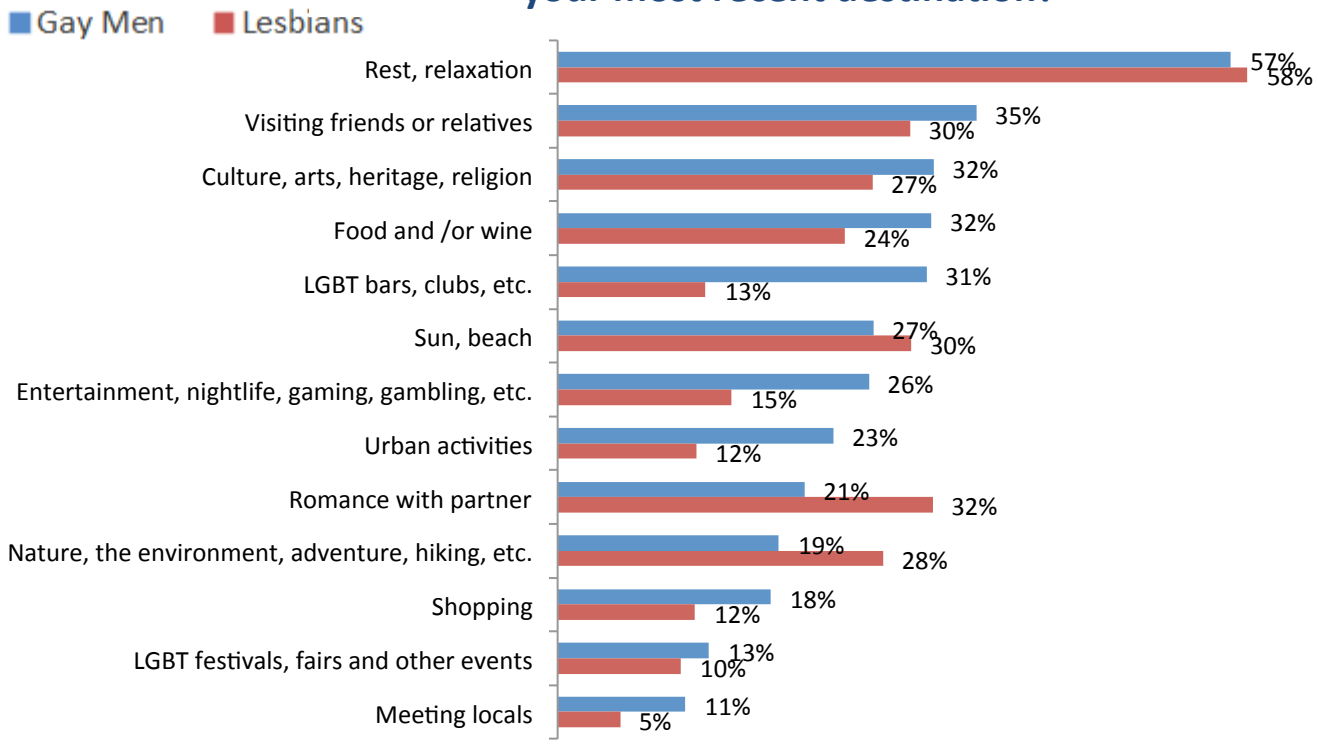
What kind of traveler are you?



What kind of traveler are you? *Gay men n= 4,059; Lesbians n= 1,247*

When asked about their last vacation, most LGBTs traveled for rest and relaxation. A combination of traditional urban activities scored well, but no specific urban activity far out rated others.

What were your main interests when traveling to your most recent destination?



What were your main interests when traveling to your most recent destination? *Gay men n= 4,059; Lesbians n= 1,247*

Summertime is the most popular travel season for both groups. However, LGBT travel is relatively disbursed across months of the year.

In the past 12 months, in which month(s) did you travel on vacation/holiday?

	January	February	March	April	May	June	July	August	September	October	November	December
	27%	25%	28%	27%	33%	37%	37%	39%	35%	26%	24%	29%

	January	February	March	April	May	June	July	August	September	October	November	December
	20%	23%	27%	25%	29%	36%	35%	38%	36%	25%	21%	24%

How many total trips did you take in the past 12 months, where you stayed in paid accommodations at least one night?
Total USA LGBT n=5,784; Gay men n= 4,059; Lesbians n= 1,247

79% of LGBTs in the U.S. hold a valid passport. 51% of these passport holders used their passport to travel to another country in the past year; gay men slightly higher compared to lesbians.

Have and Used their Passport In Past Year

51%

Of US LGBT passport holders used their passport in past year

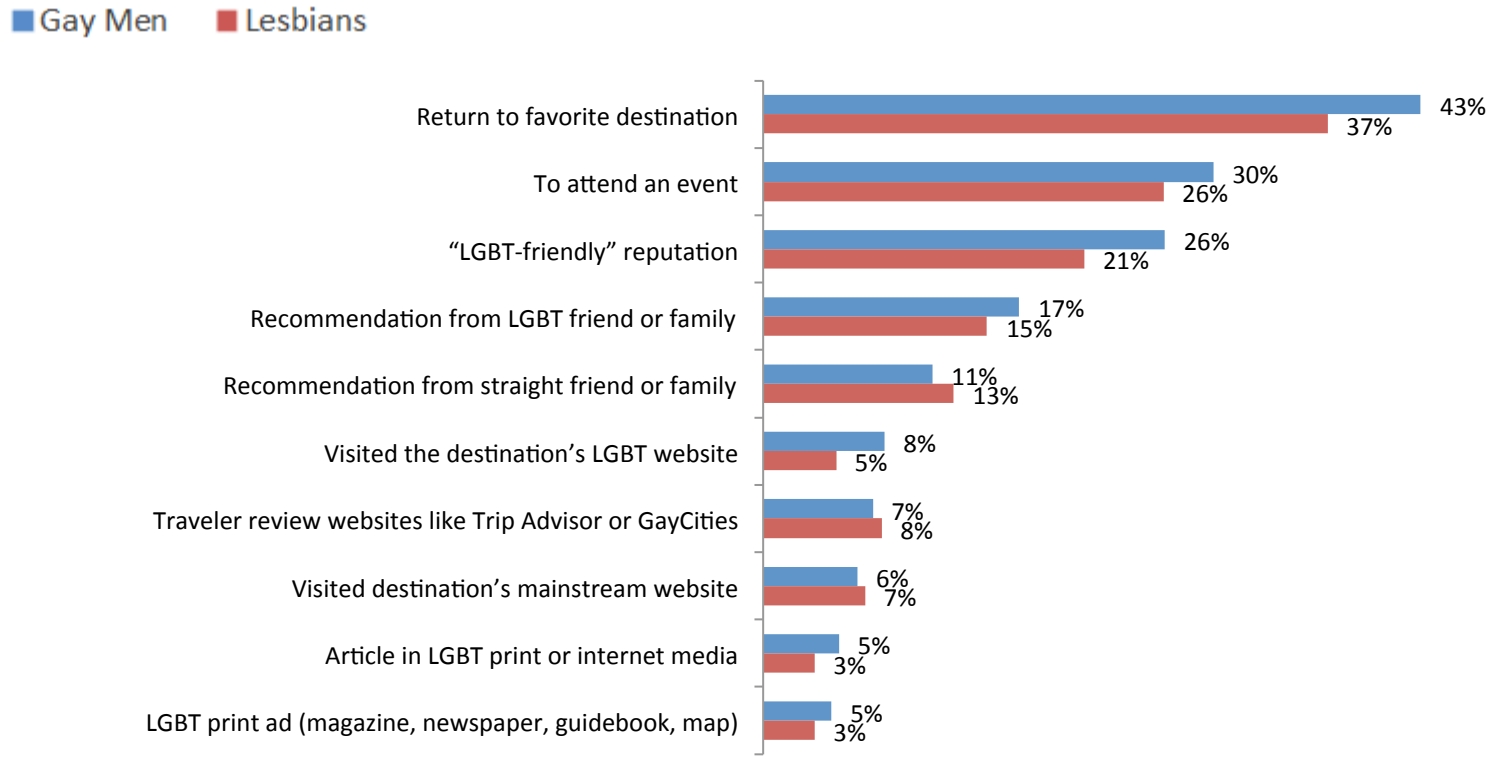
54%

47%

Did you use your passport in the last 12 months? Total USA LGBT n=5,784; Gay men n= 4,059; Lesbians n= 1,247 Passport holders n= 4,548.

Returning to a favorite place is the leading motivator for selecting a destination; but LGBT-friendly reputation can't be discounted

What got you interested in visiting your most recent travel destination?

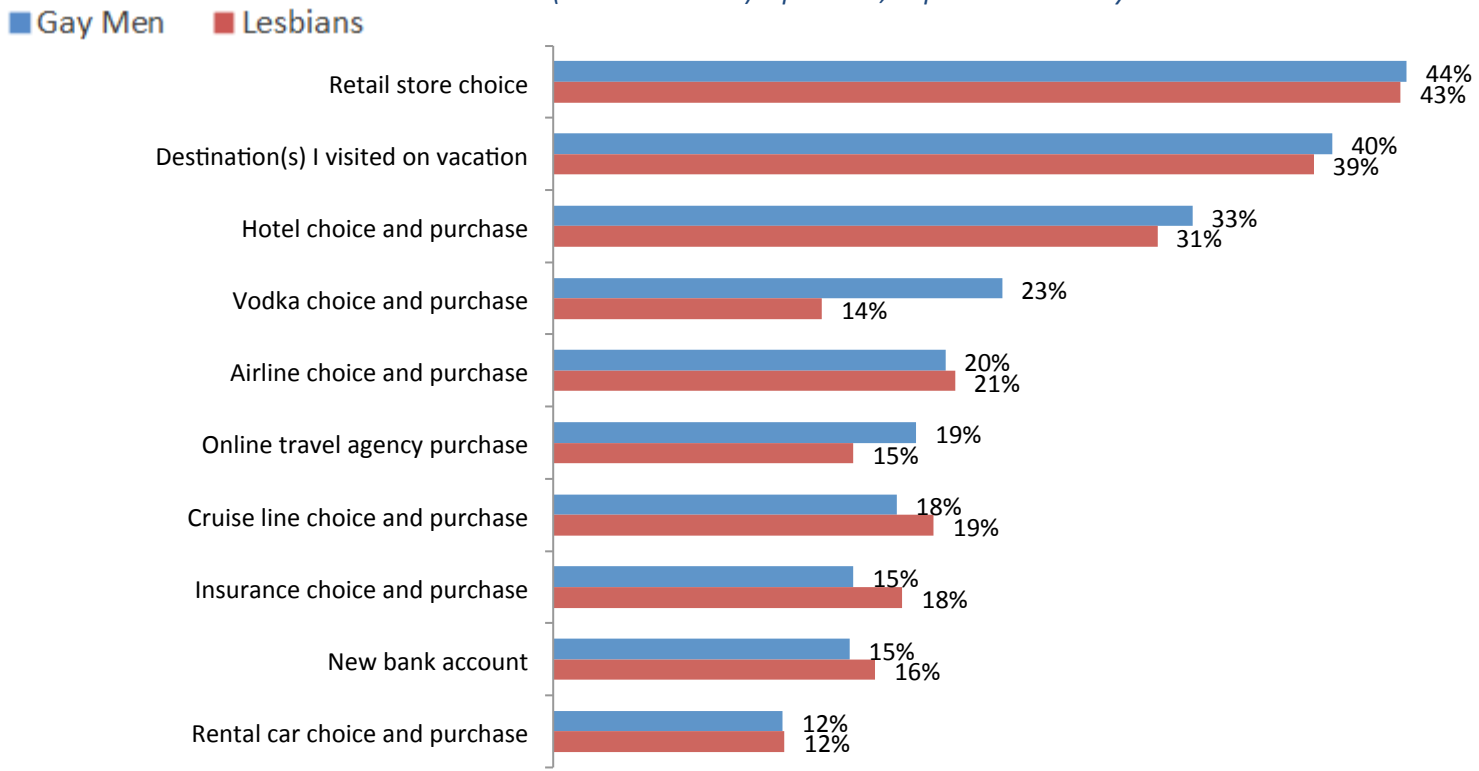


What got you interested in traveling to (destination)? *Gay men n= 4,059; Lesbians n= 1,247*

Among a variety of consumer products and services, an "LGBT friendly" reputation influences travel purchases in particular.

Impact of destination's or company's "LGBT-friendliness" on decision-making

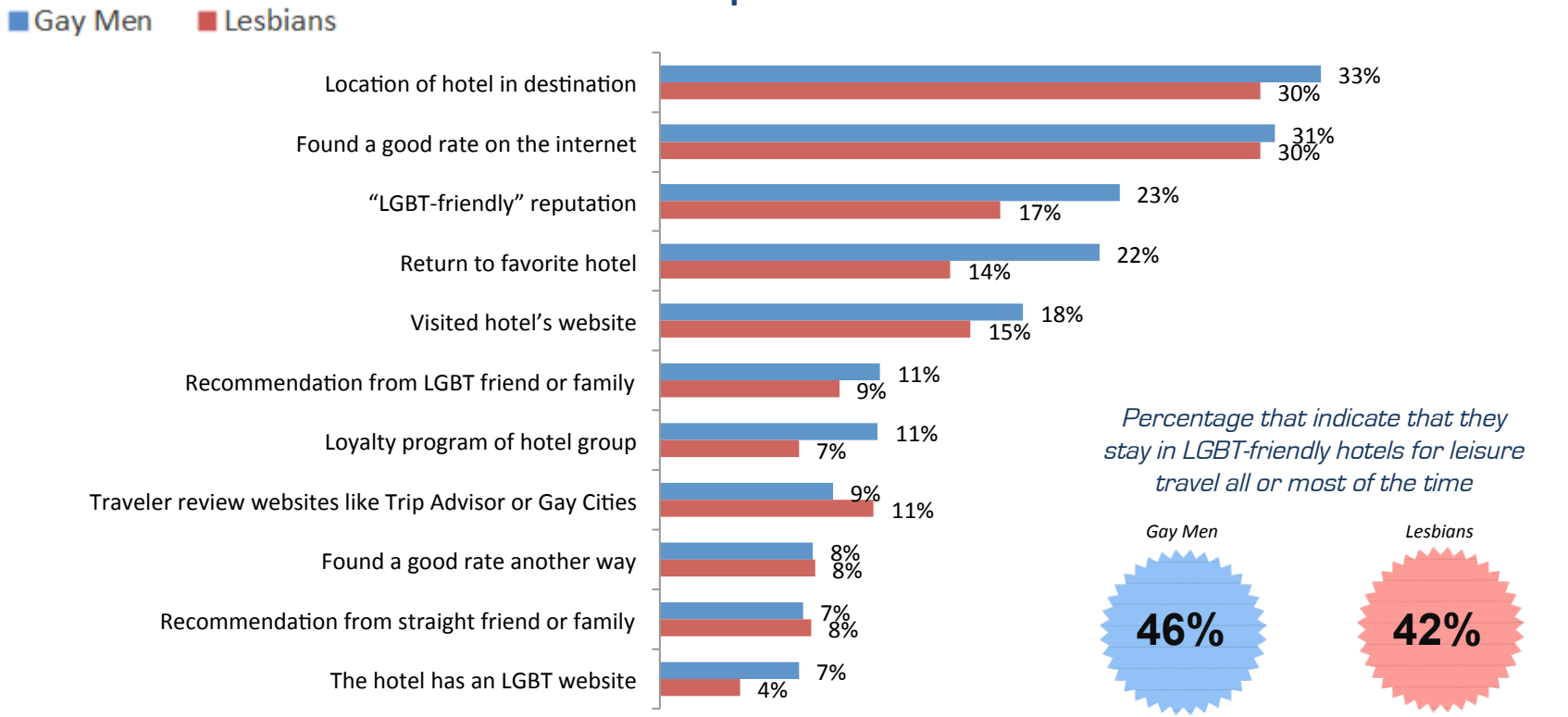
(Past 12 months) 5 pt. scale, Top 2 box summary



In the past 12 months, how much did a destination's or company's "LGBT-friendliness" (advertising, sponsorships, political support, etc.) favorably influence your actual purchases? Gay men n= 4,059; Lesbians n= 1,247

Location and price are prime motivators for hotel selection. LGBT reputation ranks third.

What motivated you to choose your most recent hotel compared to others?



What motivated you to choose this most recent hotel? *Gay men n= 4,059; Lesbians n= 1,247*

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Part 3:
Research, Booking & Purchasing

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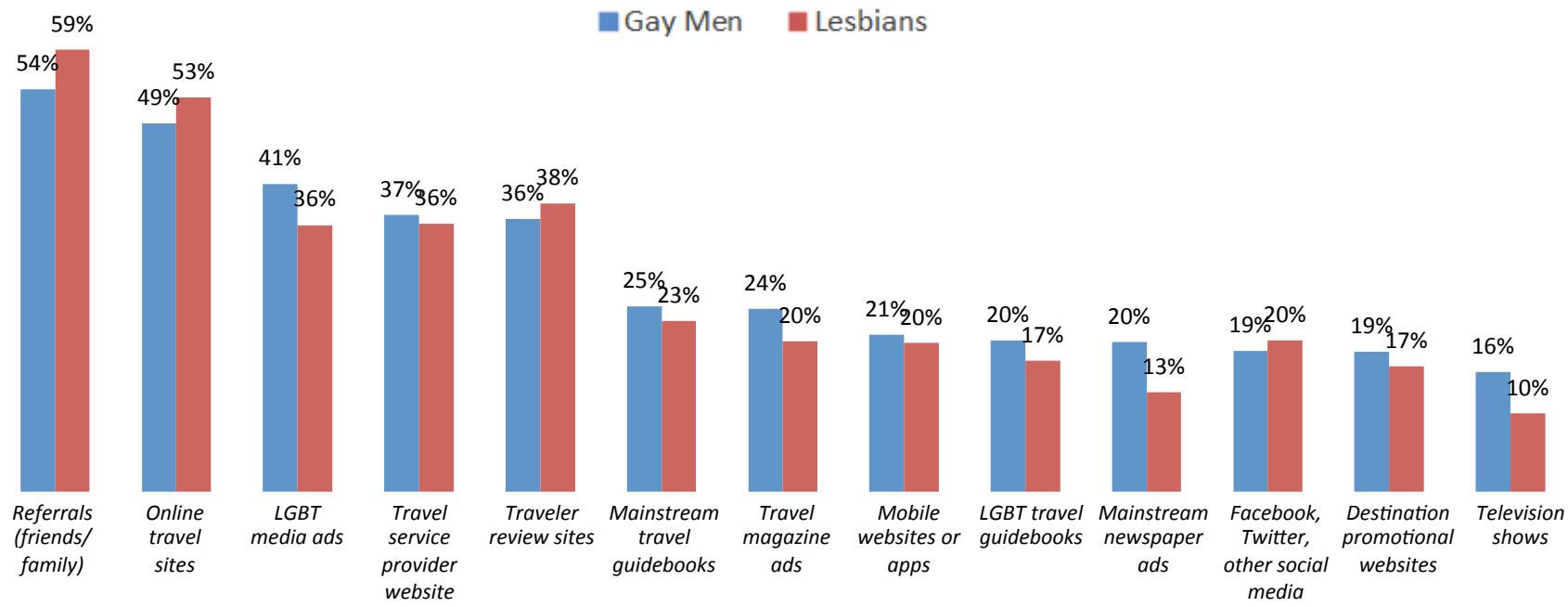
LGBT media ads are important sources of travel information for gay men and lesbians, right behind word-of-mouth and travel websites.

Which of the following did you use in the past 12 months to obtain information about travel services or companies?



Which of the following did you use in the past 12 months to obtain information about travel services or companies? *Gay men n= 4,059; Lesbians n= 1,247*

When making travel decisions, about 1 in 4 LGBTs have been influenced by information and feedback found in social media.

Made Travel Decisions Based on Social Media
(last 12 months)

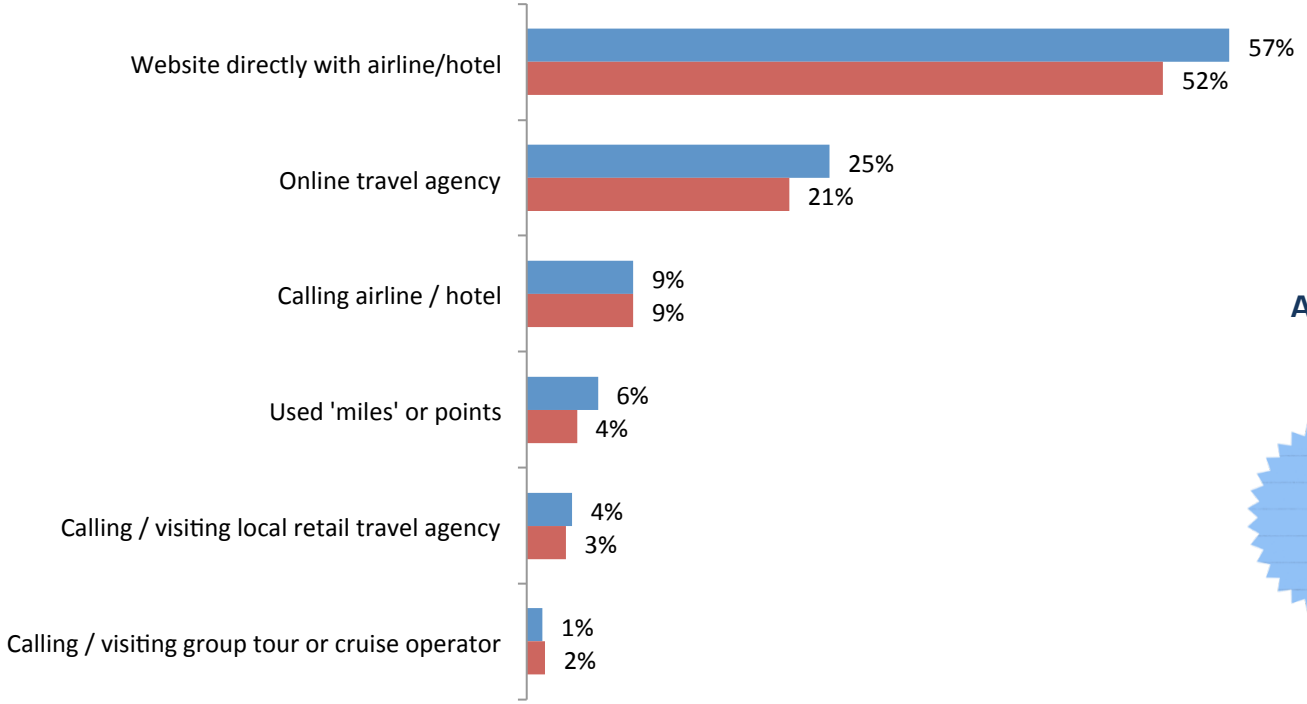
24%

26%

In the past 12 months, have you made any leisure travel decisions based primarily on research or feedback received on a social media/networking website? Gay men n= 4,059; Lesbians n= 1,247

Booking online directly with a hotel or airline is by far the most common booking method. LGBTs view on average three websites before making a purchasing decision.

How did you purchase your most recent vacation?



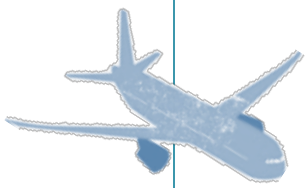
Avg. # sites compared before booking*

Gay Men	Lesbians
3.0	3.5

*How did you purchase your most recent vacation? Gay men n= 4,059; Lesbians n= 1,247 *Most recent trip*

LGBTs belong to airline, hotel rewards programs in large numbers. Gay men are somewhat more likely to belong.

Loyalty & Rewards Programs



Belong to an airline frequent flyer program (s)

71%

66%

Belong to a hotel guest loyalty program(s)

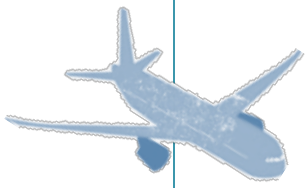
62%

56%

How many airline frequent flyer program(s) or hotel guest loyalty program(s) do you belong to?
Total Gay men n= 4,059; Lesbians n= 1,247

Most LGBTs belong to multiple airline and hotel loyalty programs.

Of those enrolled in loyalty programs, number of different airlines/hotels with membership



Belong to an airline frequent flyer program(s)

One • 32% Two • 26% Three • 19% Four+ • 23%

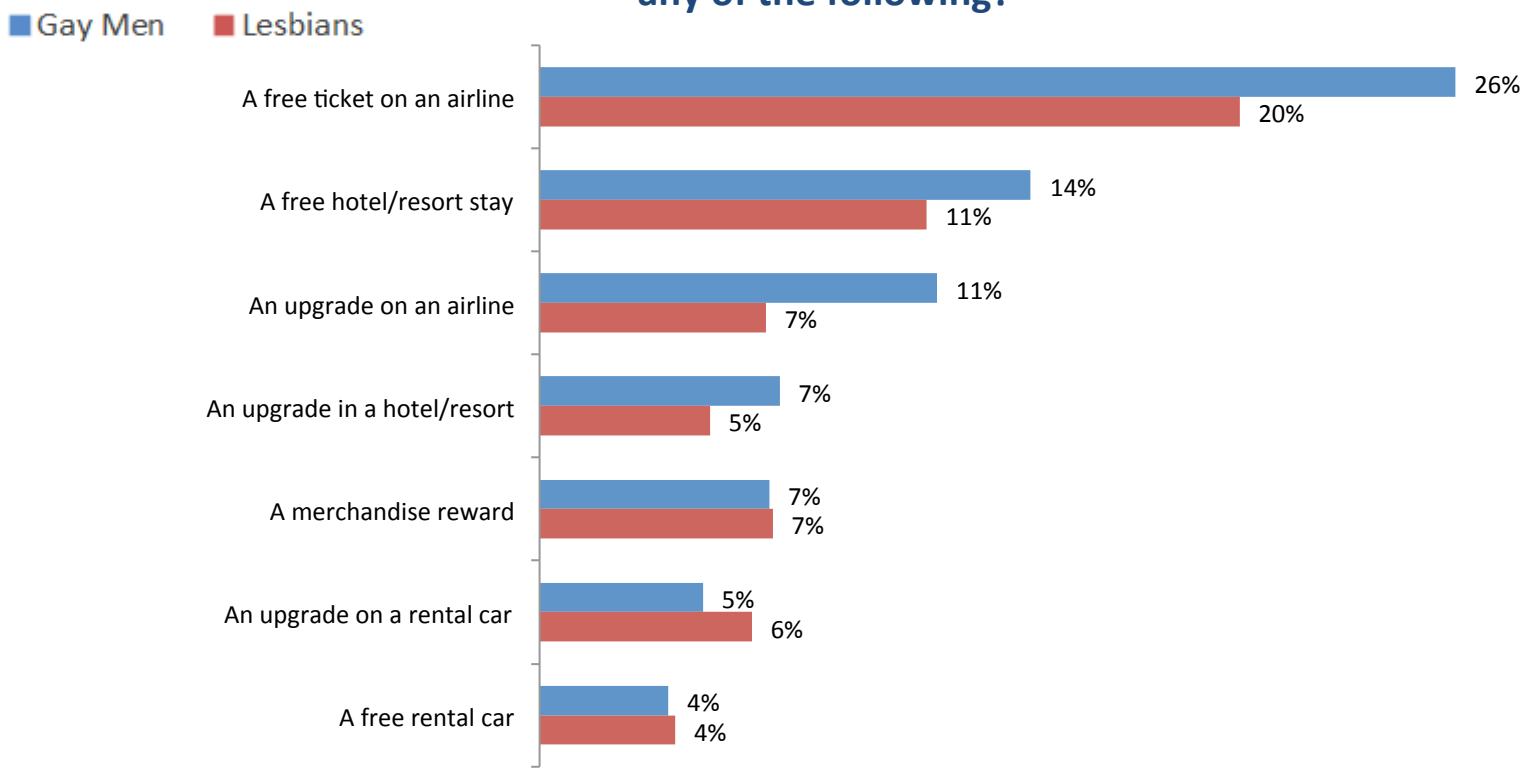
Belong to a hotel guest loyalty program(s)

One • 32% Two • 30% Three • 17% Four+ • 21%

How many airline frequent flyer program(s) or hotel guest loyalty program(s) do you belong to?
Total USA LGBT n=3,928 for airlines and 3,402 for hotels.

Gay men are somewhat more likely than lesbians to redeem airline miles for free tickets

In the past year, have you redeemed any miles or points for any of the following?



How many total trips did you take in the past 12 months, where you stayed in paid accommodations at least one night?
Total USA LGBT n=5,784; Gay men n= 4,059; Lesbians n= 1,247

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Part 4:
Destination Ranking & Hotel Brand Recall

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2012 Leisure + Business U.S. Traveler Destination Rankings

All LGBT

Rank	Destination	% Visited
1	New York City, NY	29%
2	Chicago, IL	23-24%
2	San Francisco, CA	23-24%
4	Las Vegas, NV	20-21%
4	Los Angeles / West Hollywood, CA	20-21%
4	Washington, DC	20-21%
7	Boston, MA	14-15%
8	Ft. Lauderdale/Wilton Manors, FL	12-13%
8	San Diego, CA	12-13%

Rank	Destination	% Visited
10	Atlanta, GA	10-11%
10	Dallas, TX	10-11%
10	Miami/ South Beach, FL	10-11%
10	New Orleans, LA	10-11%
10	Orlando, FL	10-11%
10	Palm Springs, CA	10-11%
10	Philadelphia, PA	10-11%
10	Seattle, WA	10-11%
18	Denver, CO	8-9%
18	Hawaii	8-9%
18	Phoenix, AZ	8-9%
18	Portland, OR	8-9%
18	Tampa/St. Petersburg, FL	8-9%

Note many ties, with % differences within margin of error.

LGBT USA Participants n= 5,784

Top Business Travel Destinations – U.S. LGBTs

Rank	Destination	% Visited
1st Tier	Chicago, New York City, Washington, DC	7+%
2nd Tier	Dallas, Las Vegas, Los Angeles, San Francisco, Washington, DC	5-6%
3rd Tier	Atlanta, Boston, Denver, Houston, Orlando, Philadelphia, Phoenix, Seattle	3-4%

Total USA LGBT n=5,784

Gay Men: 2012 Leisure Only U.S. Destination Rankings

AMONG GAY MEN IN THE U.S

Rank	Destination	% Visited
1	New York City, NY	24%
2	San Francisco, CA	19%
3	Chicago, IL	17%
3	Las Vegas, NV	17%
5	Los Angeles / West Hollywood, CA	15%
6	Washington, DC	14%
7	Ft. Lauderdale/Wilton Manors, FL	13%
8	Palm Springs, CA	11%
9	Orlando, FL	10%
9	San Diego, CA	10%
9	Boston, MA	10%
9	Miami/ South Beach, FL	10%
13	New Orleans, LA	9%

Rank	Destination	% Visited
14	Atlanta, GA	7%
14	Denver, CO	7%
14	Philadelphia, PA	7%
14	Seattle, WA	7%
14	Key West / Florida Keys, FL	7%
14	Hawaii	7%
20	Dallas, TX	6%
20	Portland, OR	6%
20	Tampa/St. Petersburg, FL	6%
20	Napa County, CA	6%
20	Provincetown, MA	6%
20	Sonoma, CA	6%

Gay men n= 4,059

Lesbians: 2012 Leisure Only U.S. Destination Rankings

AMONG LESBIANS IN THE U.S

Rank	Destination	% Visited
1	New York City, NY	16%
2	San Francisco, CA	15%
3	Las Vegas, NV	13%
4	Chicago, IL	12%
5	Washington, DC	11%
6	Los Angeles / West Hollywood, CA	10%
7	Boston, MA	9%
8	San Diego, CA	9%
9	Orlando, FL	8%
10	Atlanta, GA	7%
10	Seattle, WA	7%
10	Hawaii	7%

Rank	Destination	% Visited
10	Provincetown, MA	7%
10	Portland, OR	7%
15	Palm Springs, CA	6%
15	Philadelphia, PA	6%
15	Tampa/St. Petersburg, FL	6%
15	Napa County, CA	6%
15	Key West / Florida Keys, FL	6%
15	Tampa/St. Petersburg, FL	6%
15	Napa County, CA	6%
15	Sonoma, CA	6%
15	Miami/ South Beach, FL	6%

Lesbians n= 1,247

Leisure Only – Top Destinations by Generation

	Gen Y	Gen X	Boomer	Gen Y	Gen X	Boomer
New York City, NY	1	1	1	1	2	2
San Francisco, CA	2	2	2	5	3	1
Las Vegas, NV	3	4	4	4	1	3
Chicago, IL	4	3	3	3	4	5
Los Angeles / West Hollywood, CA	5	5	6	6	7	4
Washington, DC	6	6	8	2	5	7
Boston, MA	7			7	8	6
San Diego, CA	8		9	8	8	9
Miami/ South Beach, FL	9	9				
Orlando, FL	10	8	10	9	6	
Ft. Lauderdale/Wilton Manors, FL		7	5			
Palm Springs, CA		10	7			
Seattle, WA					10	8
Atlanta, GA					9	
Provincetown, MA						10
Philadelphia, PA				10		
	n=1021	*n=1079*	*n=1748*	*n=301*	*n=345*	*n=546*

Top International Travel Leisure Destinations – U.S. LGBTs

Destination	% Visited
Canada	13%
England	9%
France	8%
Mexico	8%
Spain	7%
Germany	6%
Italy	6%
Montreal, Canada	5%
Toronto, Canada	5%
Vancouver, Canada	5%
Australia	4%
Netherlands	4%
Puerto Vallarta, Mexico	4%
Cancun, Mexico	3%
Greece	3%

Destination	% Visited
Thailand	3%
Austria	2%
Belgium	2%
Costa Rica	2%
Czech Republic	2%
Denmark	2%
Hong Kong	2%
Puerto Rico	2%
Singapore	2%
Sweden	2%
Switzerland	2%
Turkey	2%
Victoria, Canada	2%
US Virgin Islands	2%

Total USA LGBT n=5,784

Top Travel Leisure Destinations – Canadian LGBTs

Rank	Destination	% Visited
1	Montreal	25%
1	Toronto	25%
3	Vancouver	17%
4	New York City, NY	16%
5	Seattle	12%
5	Calgary	12%
7	Las Vegas, NV	11%
7	Ottawa	11%
7	San Francisco, CA	11%
10	Banff	9%
11	England	8%
11	Quebec City	8%

Rank	Destination	% Visited
11	Victoria	8%
11	Whistler	8%
15	Los Angeles / West Hollywood, CA	7%
15	Halifax	7%
17	Ft. Lauderdale/Wilton Manors, FL	6%
17	Miami/ South Beach, FL	6%
17	Puerto Vallarta, Mexico	6%
21	Hawaii	5%
21	Orlando, FL	5%
21	Spain	5%
21	Washington, DC	5%

Total Canadian LGBT's n= 515

Business Travel

- LGBTs are frequent business travelers
- Gay men are somewhat more likely to book their own travel and be loyal to LGBT-friendly hotels

Business Travel Summary

Do you travel for business? →

Book some or all of my own business travel	**73%**	65%
Stay in LGBT-friendly hotels most of the time for business	**43%**	37%
10+ nights away on business in past year	42%	30%
Attended a 'mainstream' convention, past 12 months	66%	68%
Attended a LGBT convention, past 12 months	15%	17%

Business travel; Gay men n= 4,059; Lesbians n= 1,247

LGBTs mentioned several hotel brands as being especially LGBT-friendly. While no single brand was mentioned by more than 18% of respondents, the top five represent 66% of the responses.

Of all the hotel brands or chains in the world, which chain/brand does the best job outreaching to the LGBT community? *(open-ended write in responses)*

Rank by Total Response

Hilton	KIMPTON hotels & restaurants	Marriott	W HOTELS	HYATT
#1 • 18%	#2 • 15%	#3 • 14%	#4 • 12%	#5 • 7%

Rank by Response / Number of Hotel Properties

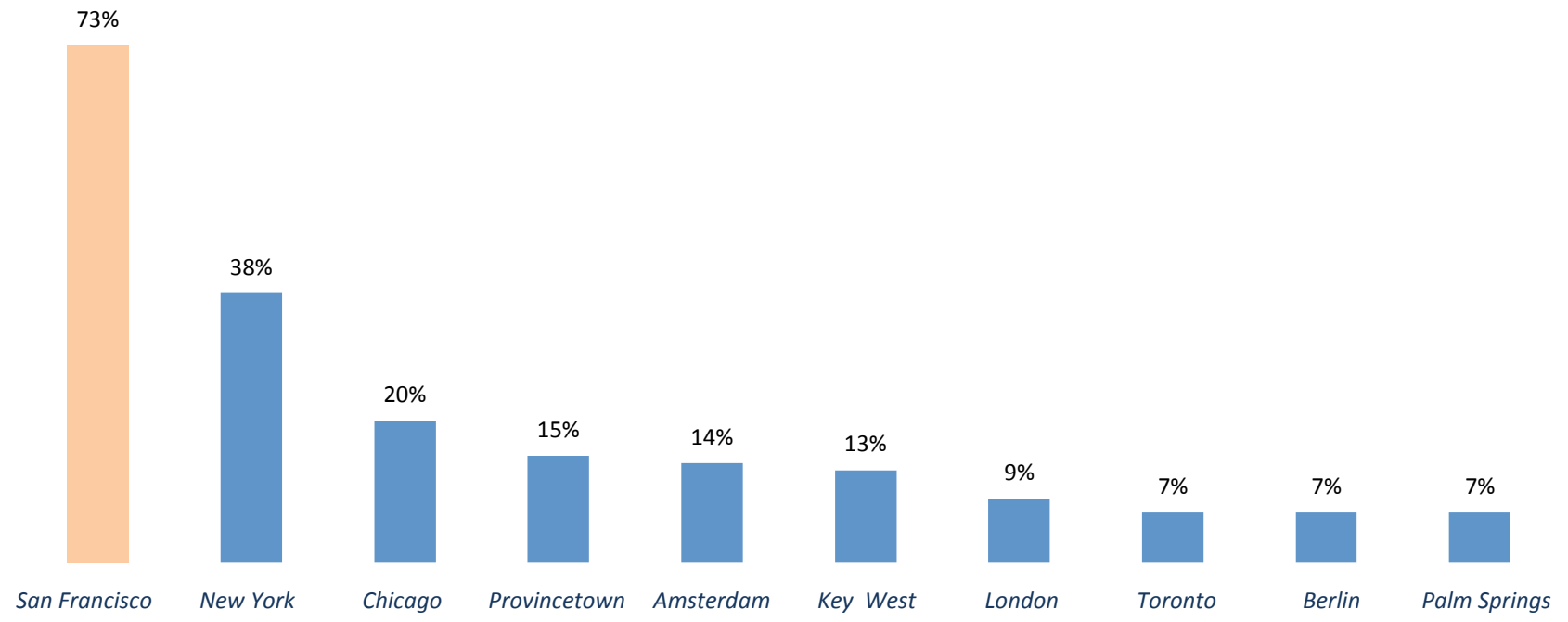
KIMPTON hotels & restaurants	W HOTELS	Hilton	Marriott	HYATT
60 hotels	60 hotels	500 hotels	500 hotels	450 hotels

Total USA LGBT n=3,115

By far, San Francisco is mentioned most often as *the* LGBT-friendly destination.

When you think about "LGBT-friendly" destinations in the world, what are the three that first come to mind ?

(open-ended write in responses)



Total USA LGBT n=5,131

Provincetown, Key West and Palm Springs have big reputations for the size of their communities.

When you think about "LGBT-friendly" destinations in the world, what are the three that first come to mind ?

(open-ended write in responses)

Rank	Destination	Population
1	Provincetown (15%)	5,000
2	Key West (13%)	25,000
3	Palm Springs (7%)	50,000
4	San Francisco (73%)	800,000
5	Amsterdam (14%)	800,000
6	Chicago (20%)	2,700,000
7	New York (38%)	8,200,000
8	Toronto (7%)	2,600,000

LGBT USA Participants n= 5,784

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Part 5:
Featured International LGBT Travel: South America

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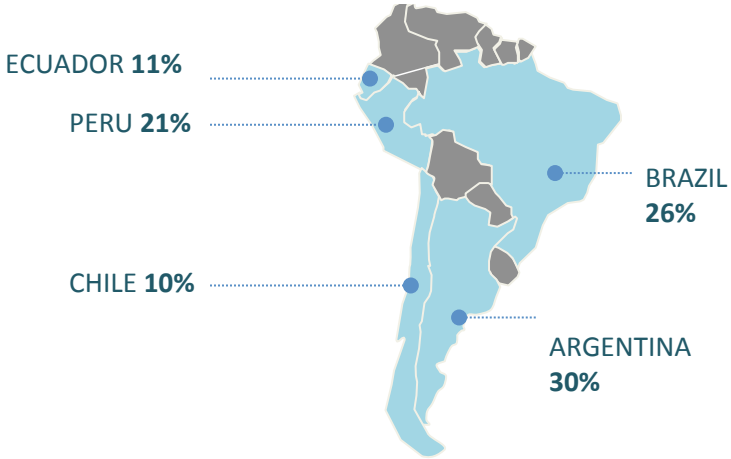
Approximately 3% of North American LGBTs visited South American destinations in the past year, which is more than double the number of "general population" visitors from North America.

South America Travel

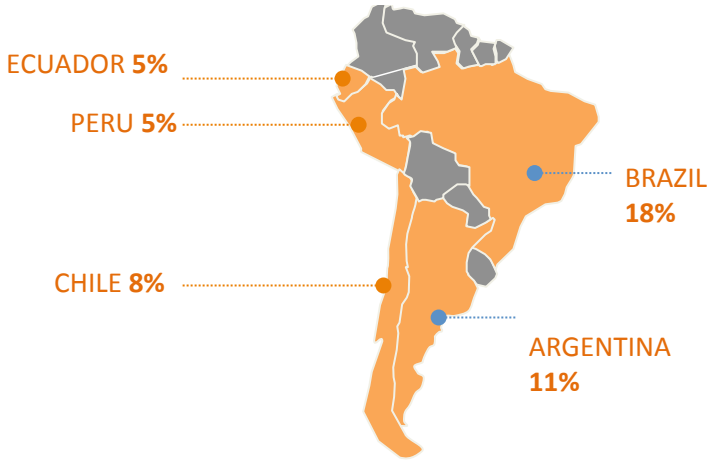
3% of total U.S. & Canada LGBTs traveled to South America over the past 12 months for leisure or business (often for both purposes).

Of the 3%

Leisure Travel



Business Travel



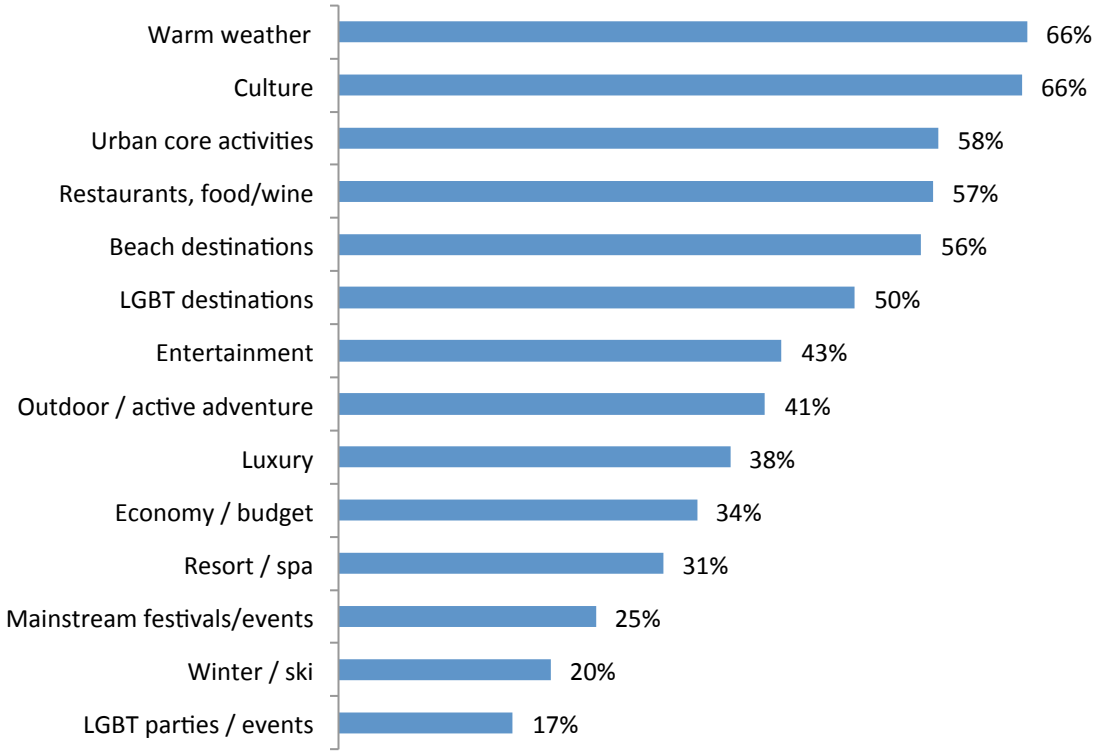
Among those who traveled to South America among US and Canada respondents n=186

Most South America LGBT travelers came from CA and FL; most say they are attracted by warm weather, culture, food & wine and beaches.

Where Are They From?

California	24%
Florida	11%
New York	9%
Texas	9%
Illinois	6%

What Kind of Traveler Are You?



Among those who traveled to South America among US and Canada respondents n=171

Connect with us to learn even more…

Thomas Roth, President
Community Marketing, Inc.
584 Castro St. #834, San Francisco, CA 94114 USA
Tel +1 415/437-3800 • Fax +1 415/552-5104
tom@CommunityMarketingInc.com

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

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Community Marketing, Inc.

About **Community Marketing & Insights**: 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. (CMI) 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 20+ years of experience and case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), with our proprietary panel of 70,000+ 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 & Insights** 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 age and ethnicity. And you'll find a world of diverse interests. 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 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 **Community Marketing & Insights** projects and training include:

- ABSOLUT (Pernod Ricard)
- American Cancer Society
- 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
- Kaiser Family Foundation (> Than AIDS campaign)
- Kimpton Hotels & Restaurants
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- Prudential Financial
- Switzerland Tourism
- Target Brands
- Travelocity
- Wyndham Vacation Ownership
- U.S. Government: Census Bureau, and HUD (Housing & Urban Development)
- Wells Fargo Bank

And many others

Community Marketing, Inc.

LGBT Market Research + Development Lab®

CMI'S LGBT
CONSUMER RESEARCH PANEL 2012-13

DID YOU KNOW…?

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% or more 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 over 20 years in business, Community Marketing 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, 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, Target Brands, Prudential, ABSOLUT Vodka, Travelocity, MillerCoors Brewing Co., Japan National Tourism Organization, E&J Gallo Wineries, OraSure Technologies, Chicago History Museum, Tourism Toronto, MetLife, Hyatt Hotels & Resorts, and many companies, as well as the American Cancer Society, Kaiser Family Foundation and the U.S. Government (Census Bureau and H.U.D.).

We also present public and custom onsite educational seminars and workshops. Last year, Community Marketing produced or presented at LGBT marketing symposia on four continents.

Learn more on our website, www.communitymarketinginc.com

Community Marketing, Inc., 584 Castro St. #834, San Francisco CA 94114 USA • 415/437-3800

SAMPLE DEMOGRAPHICS OF USA LGBT PANELISTS

44 MEDIAN AGE

41% LIVE WITH PARTNER

62% COLLEGE GRADUATES

91% IN WORK FORCE ARE EMPLOYED

74% HHI >$50K

6% PURCHASED A HOME IN THE PAST 12 MONTHS
8% PLAN TO PURCHASE A HOME IN THE NEXT 12 MONTHS

37% PURCHASED A SMARTPHONE IN THE PAST 12 MONTHS
23% PLAN TO PURCHASE A SMARTPHONE IN THE NEXT 12 MONTHS

40% DRINK WINE WEEKLY
46% DRINK BEER WEEKLY
48% DRINK SPIRITS OR COCKTAILS WEEKLY

PAST 12 MO. PURCHASES
29% MAJOR VACATION
14% AUTOMOBILE
37% SMARTPHONE
20% LAPTOP COMPUTER
21% HDTV
21% FURNITURE
18% TABLET COMPUTER
26% SPENT $1000 OR MORE ON CLOTHING
32% GYM MEMBERSHIP
29% SPA TREATMENTS
14% LGBT FUNDRAISING EVENT COSTING $100+

78% ARE INFLUENCED BY COMPANIES THAT ADVERTISE IN LGBT MEDIA
32% "LIKED" A BUSINESS ON FACEBOOK
25% READ LGBT BLOGS
22% CLICKED ON A FACEBOOK AD
14% CLICKED ON A MOBILE APP AD

AND MORE!

CMI Community Marketing & Insights
Community Marketing, Inc.

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 loose 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.

584 Castro St. #834 • San Francisco, CA 94114 USA • Tel 415/437-3800 • Fax 415/552-5104
info@CommunityMarketingInc.com • www.CommunityMarketingInc.com