



Same-Sex Couples: Weddings and Engagements

Community Marketing & Insights
In partnership with
The Gay Wedding Institute
September 2013

Who We Are



- › The **Community Marketing & Insights** team has been conducting LGBT consumer research for 20 years. Our practice includes online surveys, IDIs, MROCs, focus groups (on-site and virtual), and advisory boards in North America, Europe, Latin America, Australia and Asia. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, ad creative and brand testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › CMI's clients span a wide range of industries. Custom CMI studies have been produced for Wells Fargo Bank, Aetna, Johnson & Johnson, E&J Gallo Wineries, Prudential Financial, MetLife, SunTrust Bank, WNBA, Esurance, Target Brands, Digitas, Travelocity, American Cancer Society, Kaiser Family Foundation, Greater Fort Lauderdale CVB, Philadelphia, Chicago, San Francisco, Stockholm Tourism Board, Japan National Tourism Organization, the U.S. Census and numerous other corporations and organizations across North America and around the world.
- › CMI's research has been published in the *New York Times*, *Wall Street Journal*, *Forbes*, *USA Today*, *Washington Post*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *Advertising Week*, CBS News, NPR, Associated Press and many other international, national and regional media.

Our Partner



- › **The Gay Wedding Institute** is the world's first LGBT wedding training academy. Bernadette Coveney Smith is founder and president and the nation's leading gay wedding expert. Bernadette is an experienced facilitator known for her candid, practical approach who has trained thousands of wedding and hospitality professionals from around the world on the nuances of LGBT weddings. 14 Stories has planned more legal LGBT weddings than anyone else in the country — and was the first business to do so. Nobody knows the LGBT wedding market like The Gay Wedding Institute.
- › Bernadette and her team have produced hundreds of gay and lesbian weddings since 2004, working with couples from 33 U.S. states and around the world. Bernadette is the author of two wedding planning guides for same-sex couples, including the new book, [The Lesbian Couple's Guide to Wedding Planning](#). Bernadette holds a BS from Boston University and an MBA from New York Institute of Technology. Her expertise has been sought after by the Today Show, BBC, *the New York Times*, *the Washington Post*, *Brides magazine*, NPR, CNN, Travel and Leisure and many others. She is also the expert advice blogger on gay weddings for TheKnot's site, Gay.Weddings.com as well as the *Huffington Post*.

Foreword

In the past year, the number of states with marriage equality has increased from 6 to 14. And of course the recent United States Supreme Court decision established federal marriage recognition for same-sex couples. There is a great deal of marriage equality momentum, and all this wonderful news has a big impact on the wedding industry.

Combining the knowledge of an LGBT research organization with a wedding planning company, we created this survey to answer the burning questions about what really happens during the planning of a same-sex wedding. We asked about what traditions were followed (or not), where couples found their team of wedding vendors, the size of their wedding party, and much more.

What we learned is fascinating. By and large, same-sex couples are quite non-traditional, especially the gay grooms. We learned that the terms “husband” and “wife” haven’t quite caught on within much of the LGBT community. And we learned how important it is for wedding professionals to have inclusive language and photos in their marketing materials.

This is the widest reaching wedding survey ever conducted of same-sex couples, and the results reflect the diversity of the LGBT community – from those who eloped at City Hall to those who had a more formal celebration. The wedding industry has much work to do. But there’s also fun to be had with these joyous gay weddings! We hope you enjoy reading about the emerging gay and lesbian wedding market.



Thomas Roth, President
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Bernadette Coveney Smith, President
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Major Findings

- The economic impact for states offering civil unions or domestic partnerships is considerably less than those offering marriage. 76% of couples receiving a civil union or domestic partnership did not have a traditional wedding with ceremony and reception. This research estimates that the economic impact of same-sex couples getting legally married is three times greater than those receiving a civil union or domestic partnership, because married couples are far more likely to have a reception with guests, or their receptions have a greater number of guests.
- Comparing those already married vs. those just now engaged, the trend is for newly engaged couples to spend more on their ceremonies and have a larger number of guests at their ceremonies than those couples already married.
- Consistently across all questions considered in this study, female same-sex couples spend more on their weddings than male same-sex couples. For those already married, female same-sex couples spent 15% more than male same-sex couples.
- In every category tested, female same-sex couples were more likely to participate in “wedding ceremony traditions” than male same-sex couples. For example 66% of women purchase engagement rings vs. 19% of men. Also female same-sex couples are far more likely to follow wedding traditions such as having rehearsal dinners or first dances at the reception.
- Only 26% of same-sex couples use mainstream wedding media to research their weddings. Instead, couples use a wide variety of LGBT and mainstream magazines, websites, blogs and social media to plan their wedding. However, peer referral is the most likely place for same-sex couples to seek information.

Major Findings

- Only about half of same-sex couples fully embrace the words “husband” and “wife.” More same-sex couples prefer the terms “spouse” and “partner.”
- Legalizing marriage equality in the entire United States is important to 98% of same-sex couples.
- 76% of same-sex couples feel it is important to work with LGBT-friendly businesses when planning their wedding.
- Same-sex couples hold their ceremonies in a wide variety of locations, especially restaurants, hotels and event function spaces, but no type of space dominates over others.
- 22% of same-sex couples used a religious leader as their officiant and only 12% of same-sex marriages were held in religious spaces.
- Male couples tended to get married after being together for more than five years, while female couples were more likely to get married after being together five years or less.
- 36% of same-sex couples who are married have children.
- 67% of newly engaged same-sex couples have emotional support around their marriage from their parents compared to only 47% of those already married.

WHO WE TALKED TO



- ✓ **This report focuses on 916 United States same-sex couples who are either**
 - married (57%)
 - domestic partnership (19%)
 - engaged (18%)
 - civil union (5%)
- ✓ Bisexual men and women in opposite-sex relationships were not included in the research results

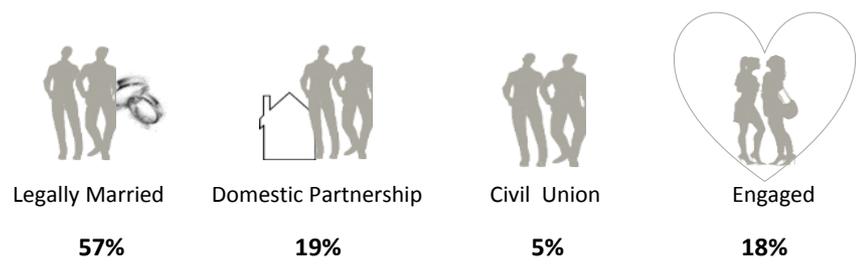
HOW WE TALKED TO THEM



- ✓ Respondents were recruited from CMI's proprietary research panel of 70,000 LGBTs, as well as through the client database of The Gay Wedding Institute
- ✓ CMI's panel, the largest LGBT panel of any research firm, was developed over the past 20 years and represents every state and province in North America
- ✓ 10-minute online survey conducted in August-September 2013
- ✓ All respondents who completed the survey were given the option to enter in a drawing to win one of five \$100 cash prizes (or designate the prize to a charity of their choice)

WHO WE TALKED TO

Relationship Status



Age



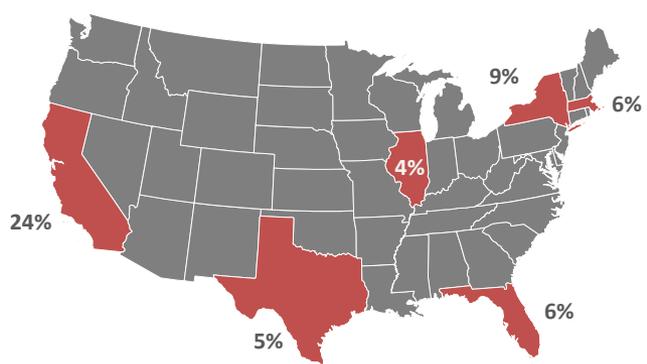
Children



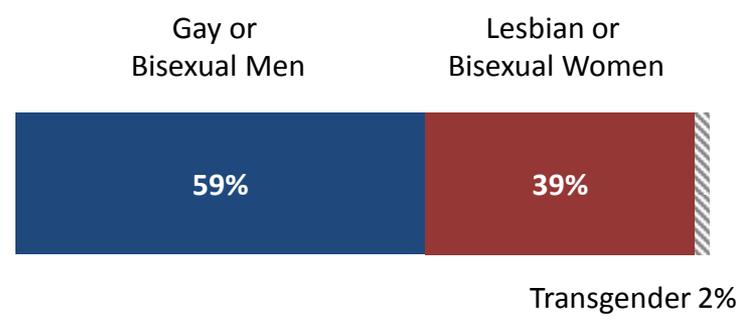
36% of married same-sex couples have children

Residence

Top states represented



Identity



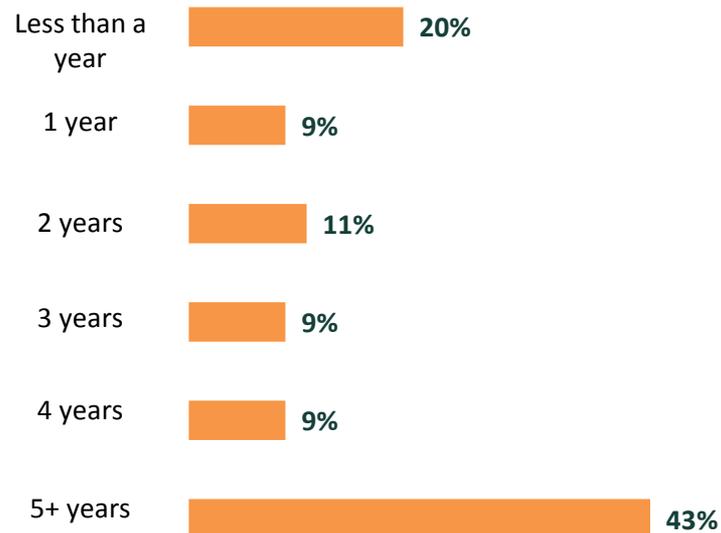
WHO WE TALKED TO

In which state did you legally marry or will you legally marry?

	Married + Engaged
California	29%
Massachusetts	17%
New York	16%
District of Columbia	6%
Iowa	5%
Washington	4%
Connecticut	4%
Vermont	3%
Maryland	2%
Minnesota	2%
Maine	1%
New Hampshire	1%
Delaware	0%
Rhode Island	0%
I legally married outside the United States	6%
Other	4%

How many years ago did you get married or enter into a civil union or domestic partnership?

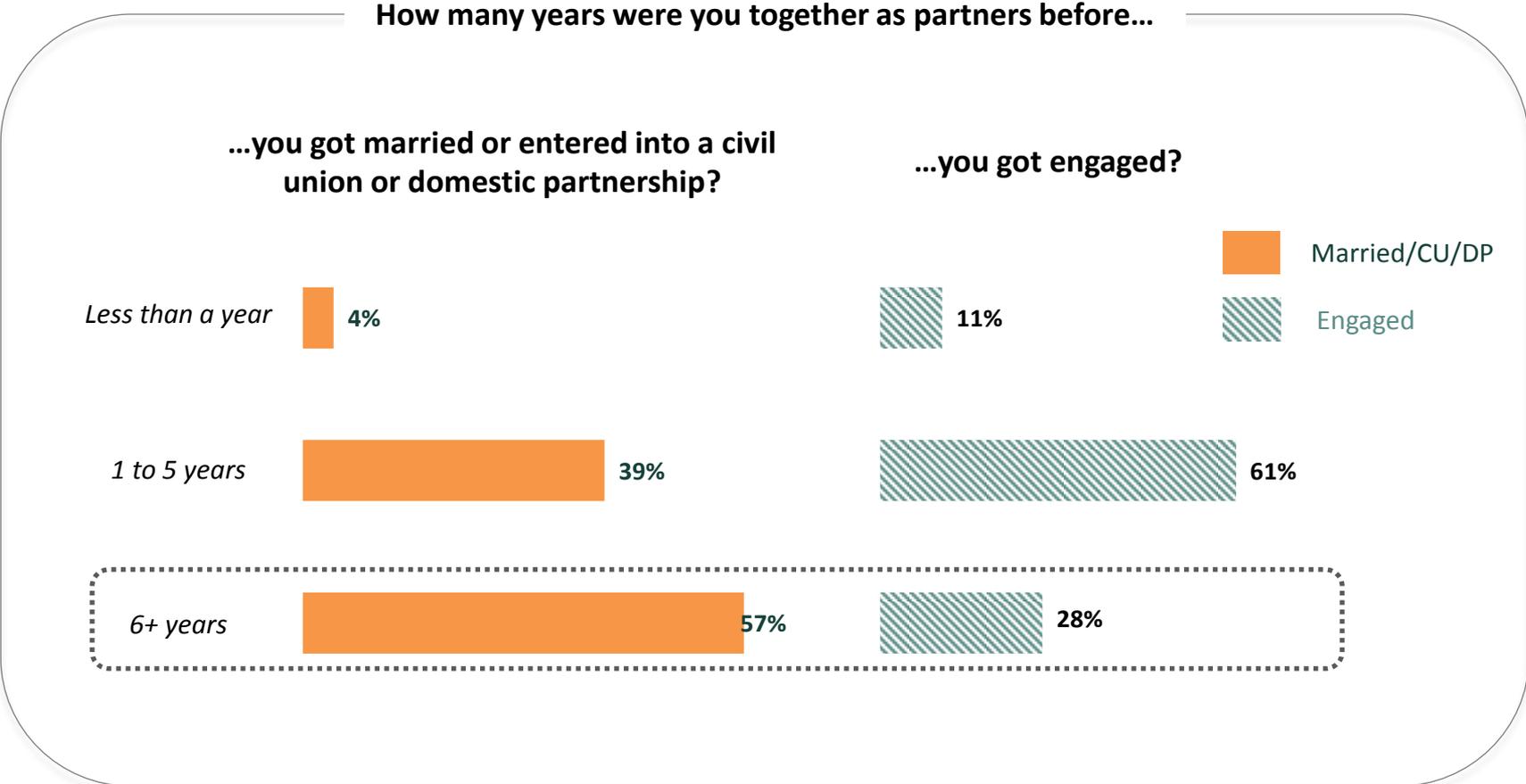
Among Married, CU or DP



88% of same-sex couples currently engaged plan to be legally married

Base: Married + Engaged n=682; Married/CU/DP n=747

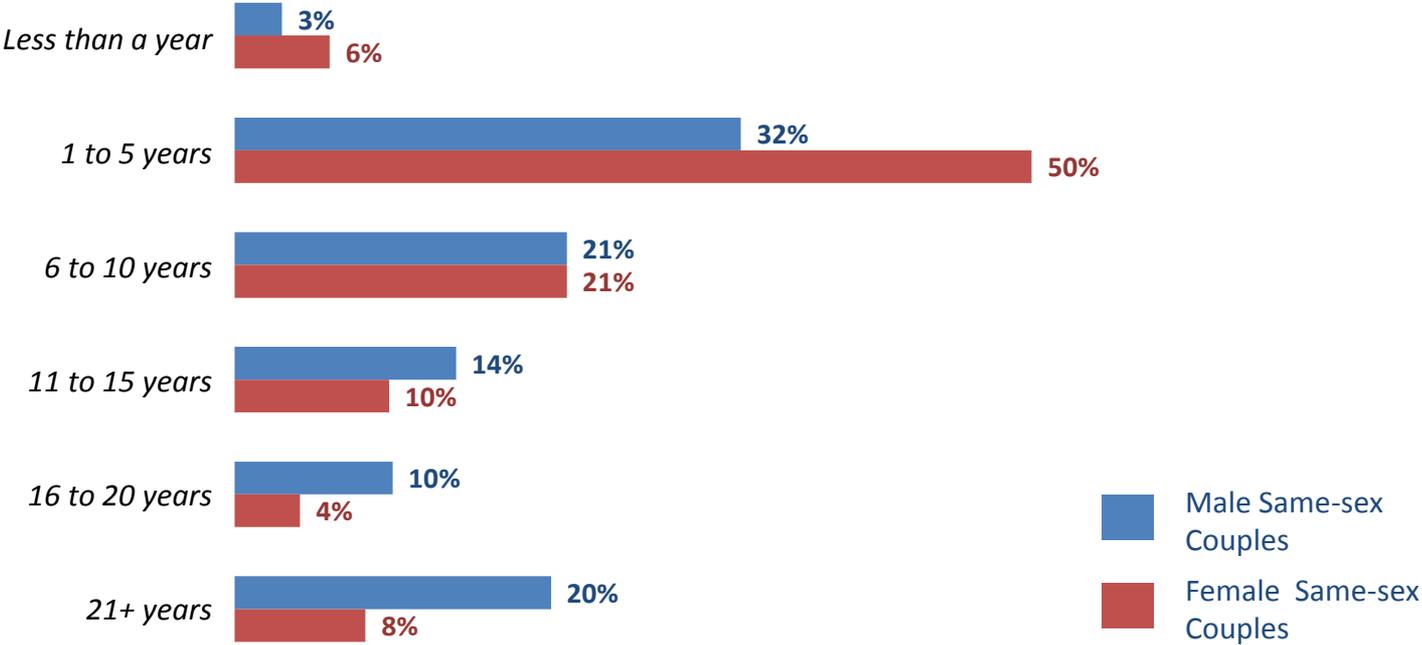
While not surprising given the pent up demand for marriage, those same-sex couples already married have been together much longer than those couples just now getting engaged.



Base: Married/CU/DP n=747; Engaged n=169

Male couples tended to get married after being together for more than five years, while female couples were more likely to get married after being together five years or less.

How many years were you together as partners before you got married or entered into a civil union or domestic partnership?



Base: Male Same-sex Couples n=458; Female Same-sex Couples n=266

Female same-sex couples were far more likely to formally propose than male same-sex couples.

Tell us about your proposal.
Among Married, CU and DP



Male Same-sex Couples



Female Same-sex Couples

We had a conversation and just agreed to get married / civil union / domestic partner



I proposed to my partner only



My partner proposed to me only



We took turns proposing to each other



Other



Base: Male Same-sex Couples n=458; Female Same-sex Couples n=266

The type of legal recognition makes a significant difference in the economic impact of same-sex weddings. Those receiving a civil union or domestic partnership most often have no reception at all, and if they do have a reception, it tends to be much smaller than those of same-sex couples being legally married.

Please mark what best describes your ceremony and/or reception.

	Engaged	Married	CU or DP*
<i>Applied for license by mail / no ceremony</i>	2%	0%	27%
<i>Simple ceremony at city hall or similar / no reception</i>	11%	26%	22%
<i>Ceremony and reception for less than 25 people</i>	13%	10%	6%
<i>Ceremony and reception for 25 to 99 people</i>	28%	19%	7%
<i>Ceremony and reception for 100 to 199 people</i>	23%	11%	7%
<i>Ceremony and reception for 200+ people</i>	5%	3%	0%
<i>Destination wedding / no traveling guests</i>	6%	9%	5%
<i>Destination wedding / less than 10 people traveling guests</i>	3%	7%	1%
<i>Destination wedding / 10 or more people traveling guests</i>	11%	8%	2%
<i>Other / did not have a ceremony and reception of any size</i>	0%	8%	22%

*Civil unions and domestic partnerships are abbreviated as CU or DP for reporting purposes.

Base: Married n=526; CU/DP n=221; Engaged n=132

Consistently across all questions considered in this study, female same-sex couples spend more on their weddings than male same-sex couples. For those already married, female same-sex couples spent 15% more than male same-sex couples.

How much did you spend on your wedding?

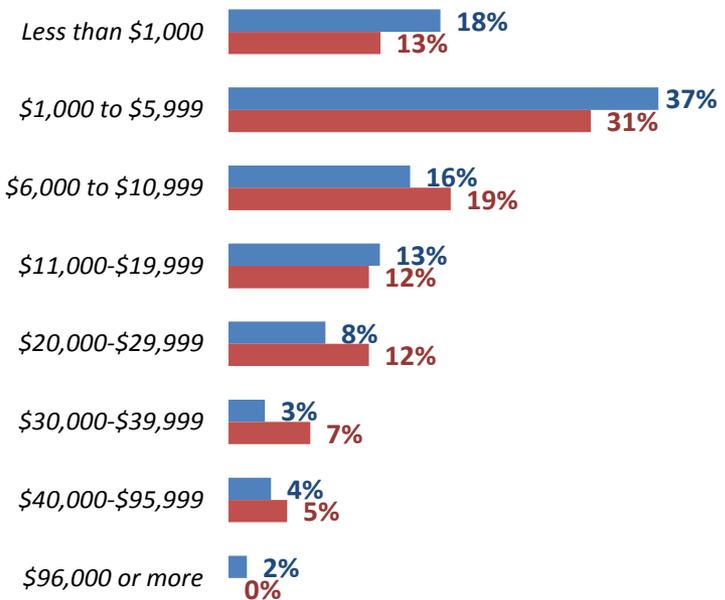
(Please select total for all expenses)

Married, CU or DP Having a Reception

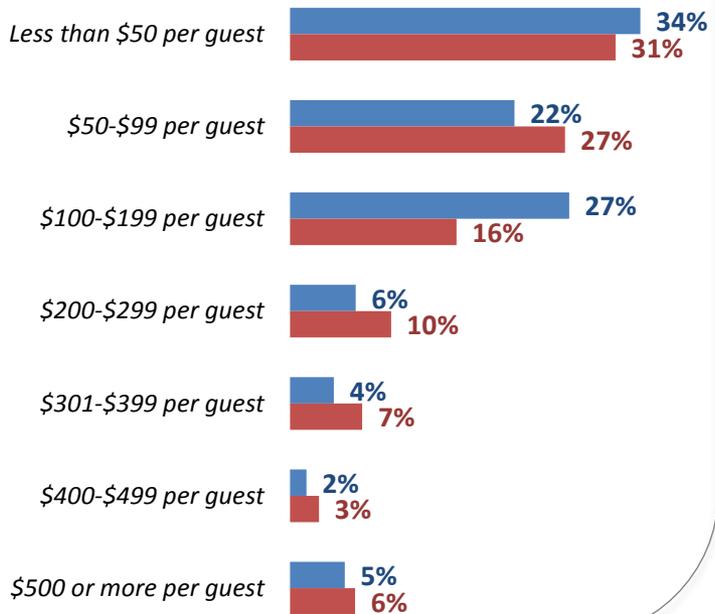
Male Same-sex Couples

Female Same-sex Couples

Total Spend



Per Guest Spend



Base: Male Same-sex Couples n=189; Female Same-sex Couples n=143

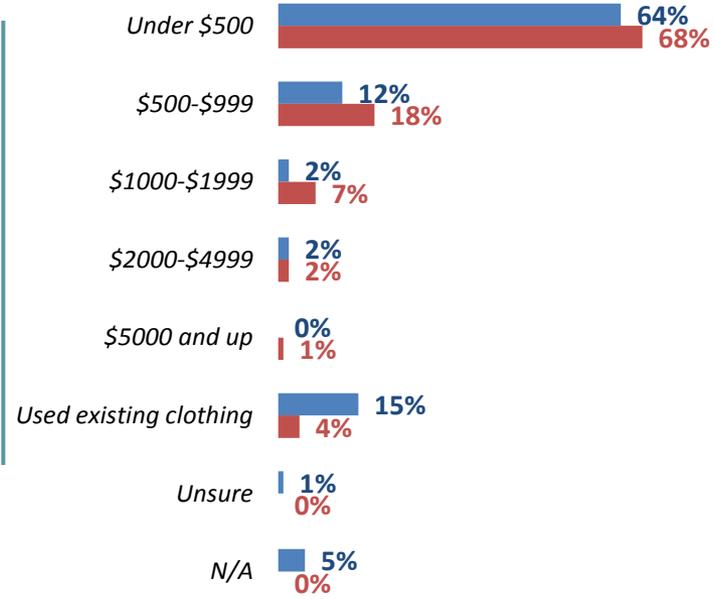
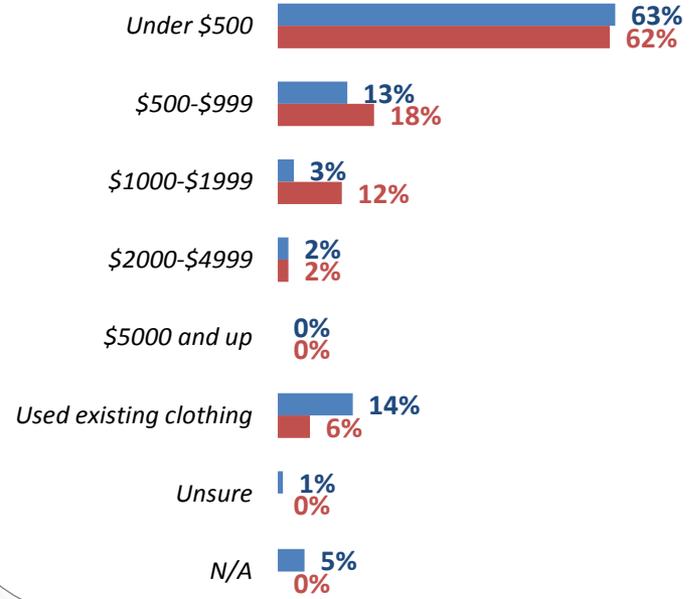
Following the trend, female same-sex couples spent more on their wedding attire than male same-sex couples.

How much did you spend on...
Among Married, CU or DP Having a Reception

Male Same-sex Couples
Female Same-sex Couples

Your Outfit

Your Partner's Outfit



Base: Male Same-sex Couples n=189; Female Same-sex Couples n=143

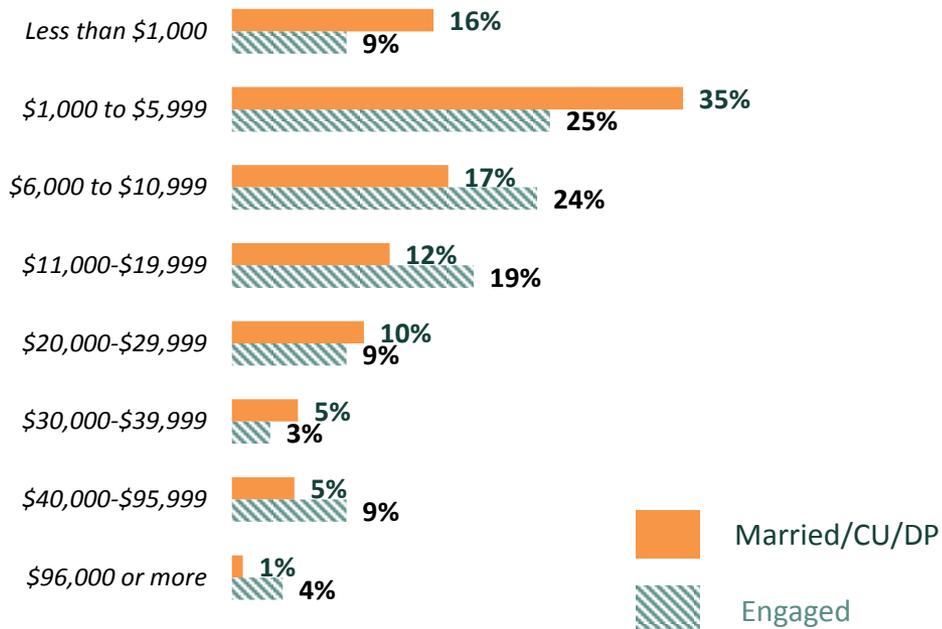
Since the June 2013 U. S. Supreme Court ruling, the overall trend is that those now engaged to be married are planning to spend more on their weddings than those who were married before the Supreme Court ruling.

How much did you spend or plan to spend on your wedding?

(Please select total for all expenses)

Married, CU or DP vs. Engaged Having a Reception

Total Spend



Base: Married/CU/DP n=354; Engaged n=107

Continuing the trend, those newly engaged will have a larger number of guests at their ceremony than those same-sex couples already married.

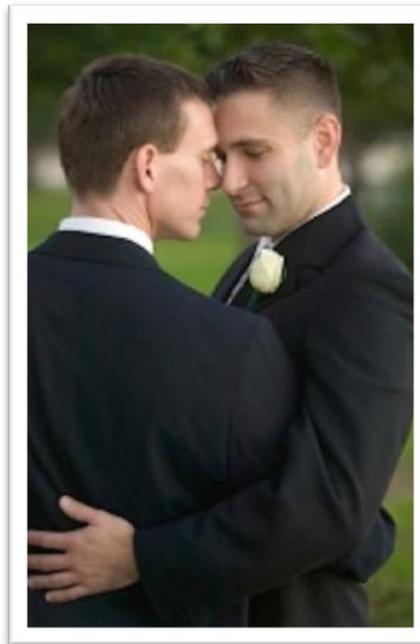
Guest Attendance for Couples Having Ceremony

Married, CU, DP vs. Engaged

Average # of Guests

Past Married,
CU or DP

65



Average # of Guests

Future
Engaged

80

Base: Married/CU/DP n=360; Engaged n=108

The economic impact for states offering civil unions or domestic partnerships is considerably less than those offering marriage. 76% of those receiving a civil union or domestic partnership had no formal wedding reception. In the previous charts we focused only on those couples having a ceremony and reception of any size. However, when we looked at all the couples, including those applying for a license by mail or a simple ceremony at City Hall, we calculated that the economic impact of same-sex couples getting legally married is three times greater than same-sex couples receiving a civil union or domestic partnership.

Please mark that which best describes your ceremony and/or reception.

	Engaged	Married	CU or DP*
<i>Applied for license by mail / no ceremony</i>	2%	0%	27%
<i>Simple ceremony at city hall or similar / no reception</i>	11%	26%	22%
<i>Ceremony and reception for less than 25 people</i>	13%	10%	6%
<i>Ceremony and reception for 25 to 99 people</i>	28%	19%	7%
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<i>Ceremony and reception for 200+ people</i>	5%	3%	0%
<i>Destination wedding / no traveling guests</i>	6%	9%	5%
<i>Destination wedding / less than 10 people traveling guests</i>	3%	7%	1%
<i>Destination wedding / 10 or more people traveling guests</i>	11%	8%	2%
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*Civil unions and domestic partnerships are abbreviated as CU or DP for reporting purposes.

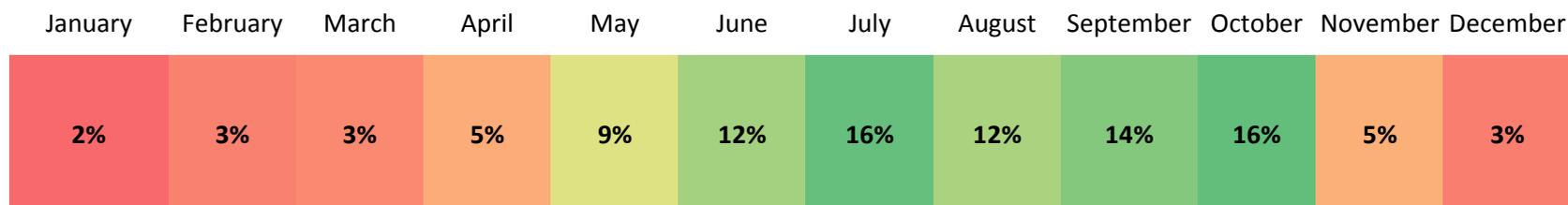
Base: Married n=526; CU/DP n=221; Engaged n=132

Late spring through early autumn are clearly the most popular times for same-sex weddings (70%), with July and October being the top months to tie the knot.



During which month did/will your wedding or ceremony take place?

Among Married, CU, DP or Engaged



54% of weddings take place during summer months.

Base: Married/DP/CU/Engaged n=840

Female same-sex couples indicated more emotional support from friends, family and peers than male same-sex couples in nearly every category. 62% of newly engaged same-sex couples have emotional support from parents for their marriage compared to only 47% of those already married.

Did you have emotional support around your marriage from any of the following people? (Mark all that apply) (Among Married, CU or DP)

62% of engaged LGBTs have the support of parents.



Male Same-sex Couples



Female Same-sex Couples

Support Source	Male Same-sex Couples	Female Same-sex Couples	Delta
Friend(s)	80%	89%	+9
Co-worker(s)	49%	60%	+11
My brother(s) or sister(s)	48%	64%	+16
Spouse's brother(s) or sister(s)	46%	54%	+8
My parent(s)	39%	59%	+20
Spouse's parent(s)	36%	55%	+19
Other	19%	16%	-3
My religious / spiritual group	14%	18%	+4

Base: Male Same-sex Couples n=458; Female Same-sex Couples n=267

Similarly, female same-sex couples indicated more financial support from parents than male same-sex couples. Although, the vast majority of all same-sex couples primarily paid for the wedding themselves.

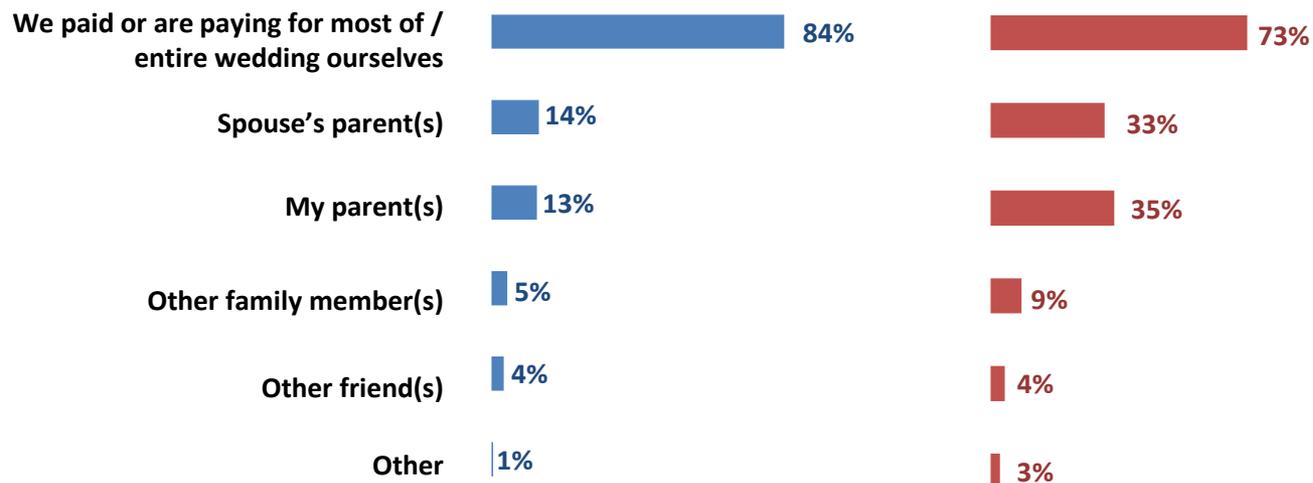
Did you receive any financial support to help pay for the wedding from any of the following people? (Mark all that apply) (Among Married, CU or DP)



Male Same-sex Couples



Female Same-sex Couples



Base: Male Same-sex Couples n=198; Female Same-sex Couples n=147

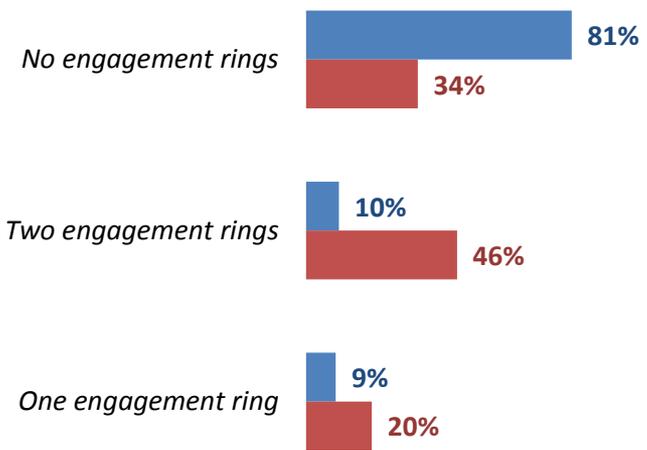
Male same-sex couples are unlikely to purchase engagement rings, however both men and women are likely to purchase wedding rings.



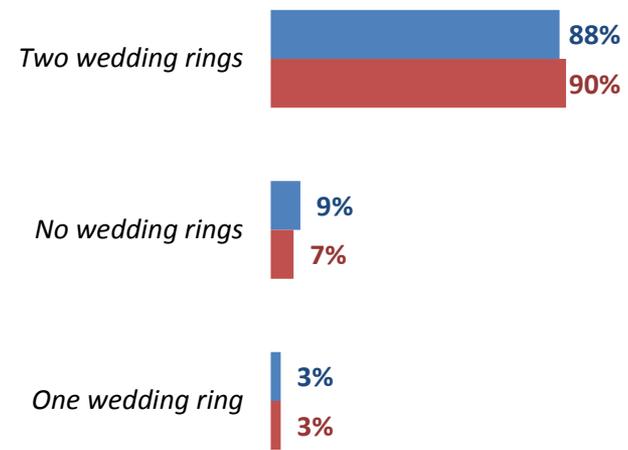
Did you purchase / exchange one or more...
Among Married, CU or DP

- Male Same-sex Couples
- Female Same-sex Couples

...engagement rings?

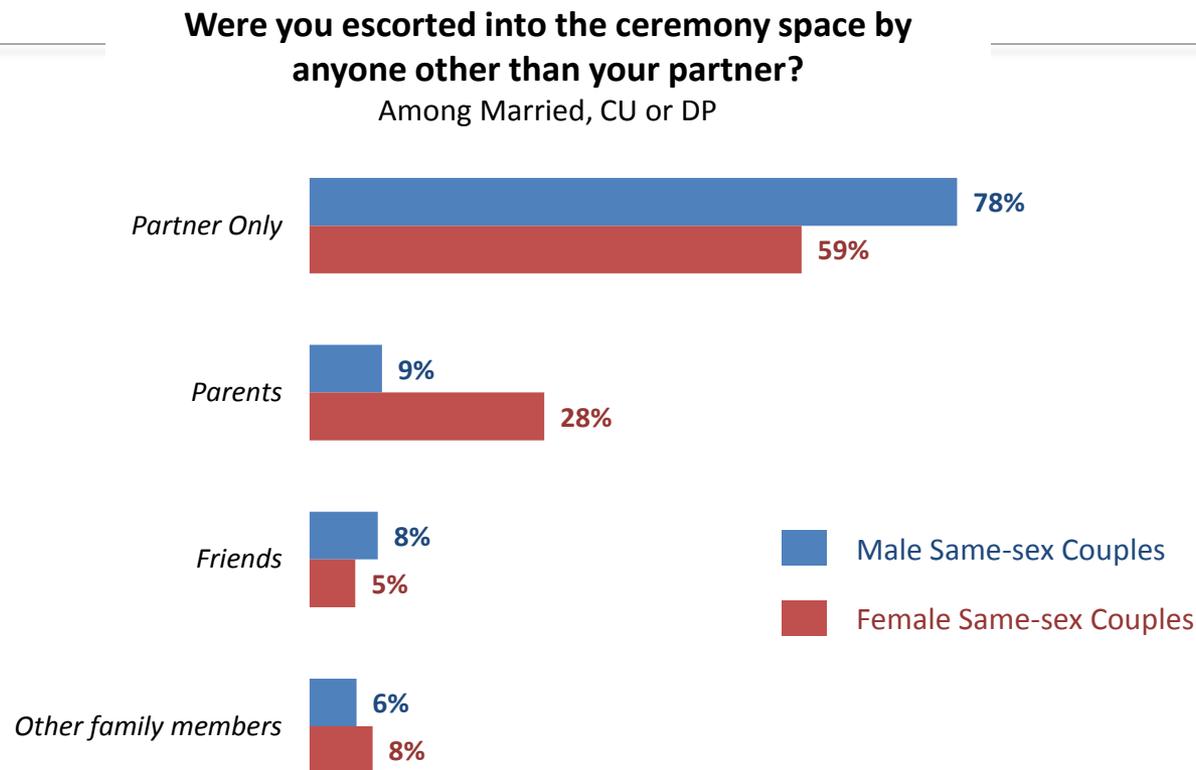


...wedding rings?



Base: Male Same-sex Couples n=198; Female Same-sex Couples n=147

Perhaps because of wedding tradition and also due to women tending to have more emotional support from parents than men, female same-sex couples are far more likely to be escorted into the ceremony by parents than men. However, most same-sex couples do not have other family members or friends escort them into the ceremony.



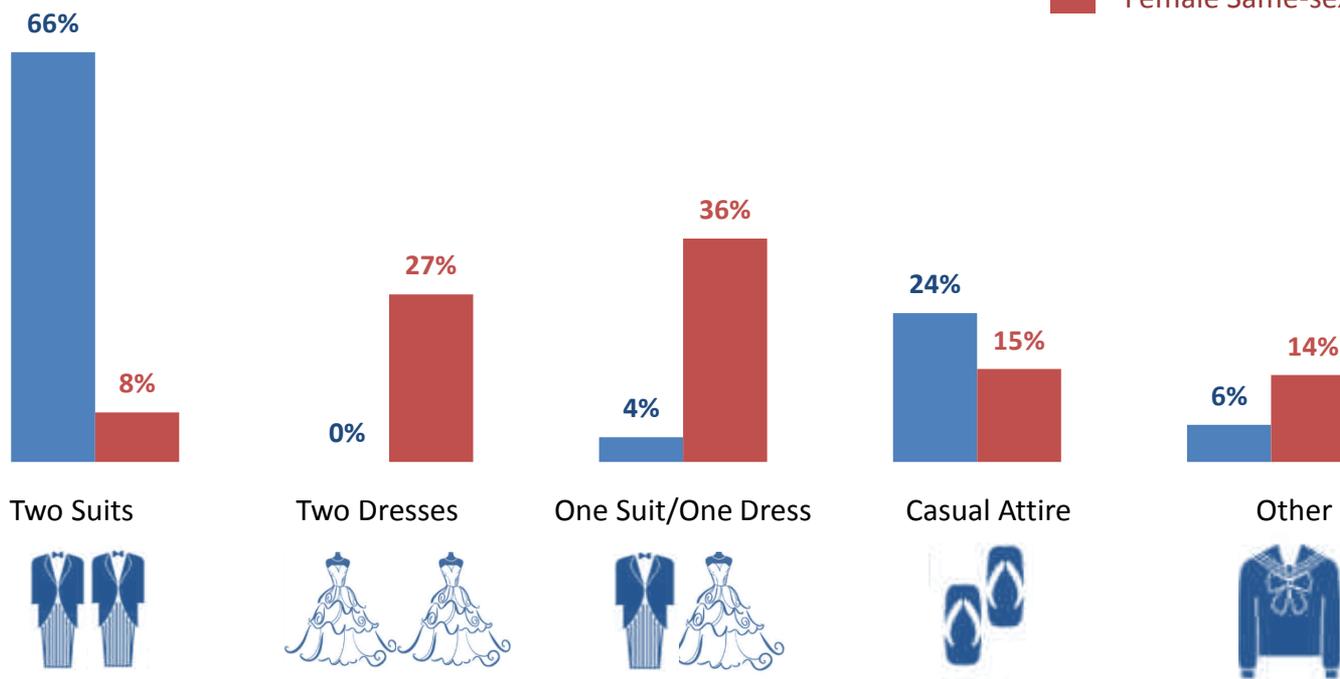
Base: Male Same-sex Couples n=198; Female Same-sex Couples n=147

Two suits is the top apparel choice for male same-sex couples, whereas female same-sex couple wedding apparel choices are more varied.

What did you wear for your wedding?

Among Married, CU or DP

Male Same-sex Couples
Female Same-sex Couples



Base: Male Same-sex Couples n=198; Female Same-sex Couples n=147

The vast majority of same-sex couples have limited size wedding parties.

How many people were in your wedding party (i.e. bridesmaids, groomsmen, etc.?)
(Total for both partners)
Among Married, CU or DP



We did not have a wedding party

1

2-3

4-5

6-7

8+



Base: Married/CU/DP n=360

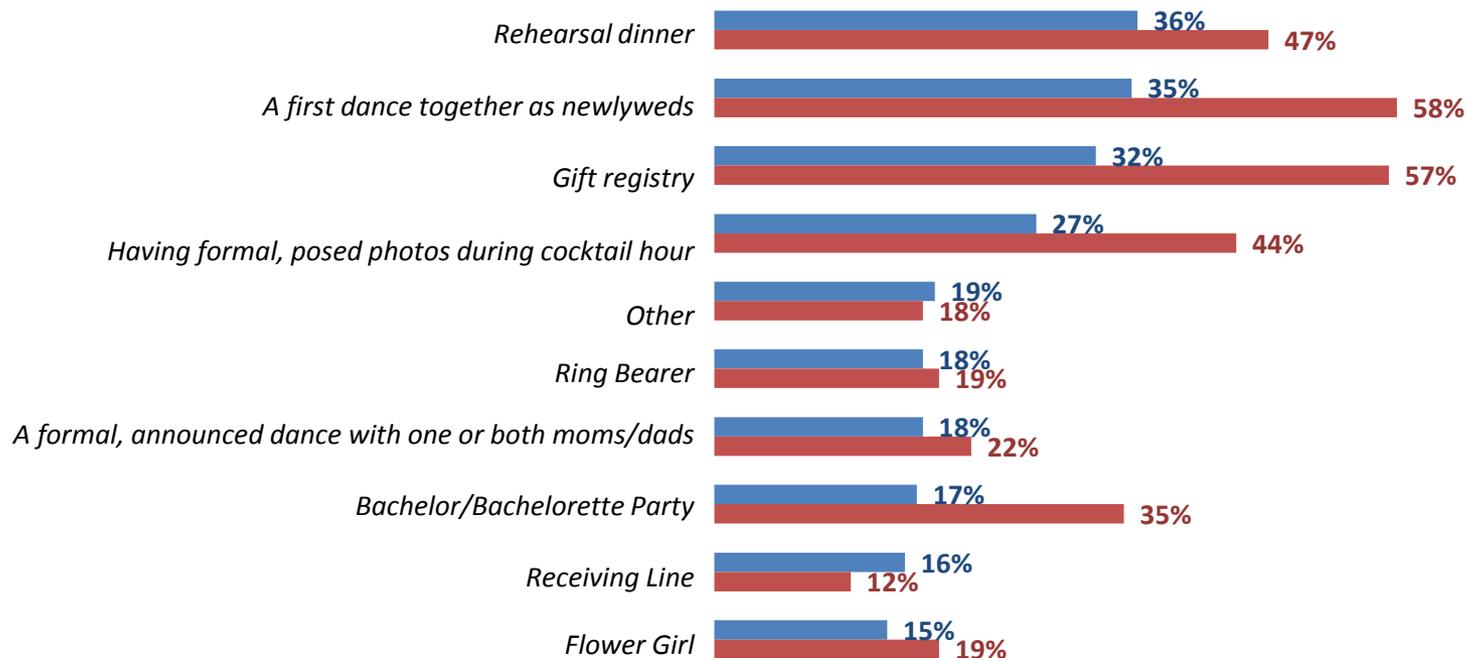
Female same-sex couples are far more likely to follow wedding ceremony traditions than male same-sex couples. However, even for women, fewer than half follow most traditions. (Slide 1 of 2)

Please tell us which of the following wedding traditions you used.

Among Married, CU or DP

■ Male Same-sex Couples

■ Female Same-sex Couples



Base: Male Same-sex Couples n=198; Female Same-sex Couples n=147

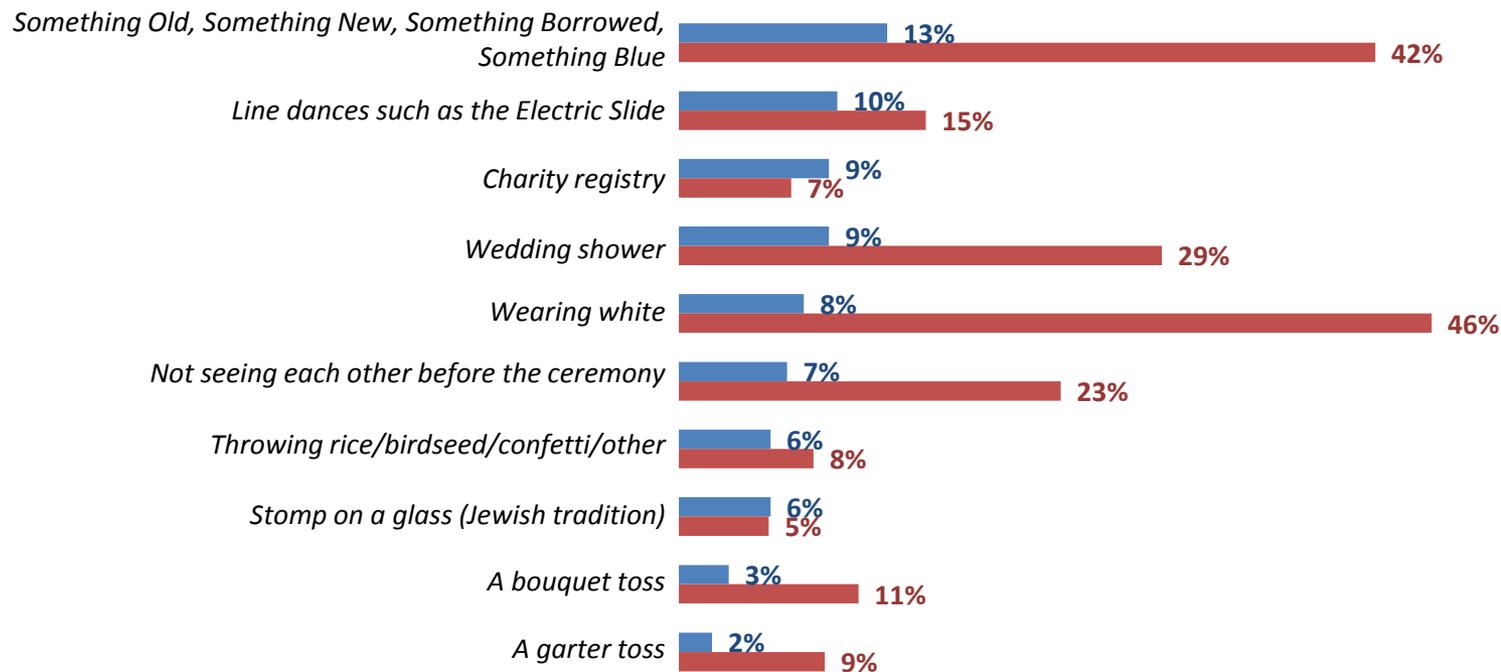
Female same-sex couples are far more likely to follow wedding ceremony traditions than male same-sex couples. However, even for women, fewer than half follow most traditions. (Slide 2 of 2)

Please tell us which of the following wedding traditions you used

Among Married, CU or DP

Male Same-sex Couples

Female Same-sex Couples

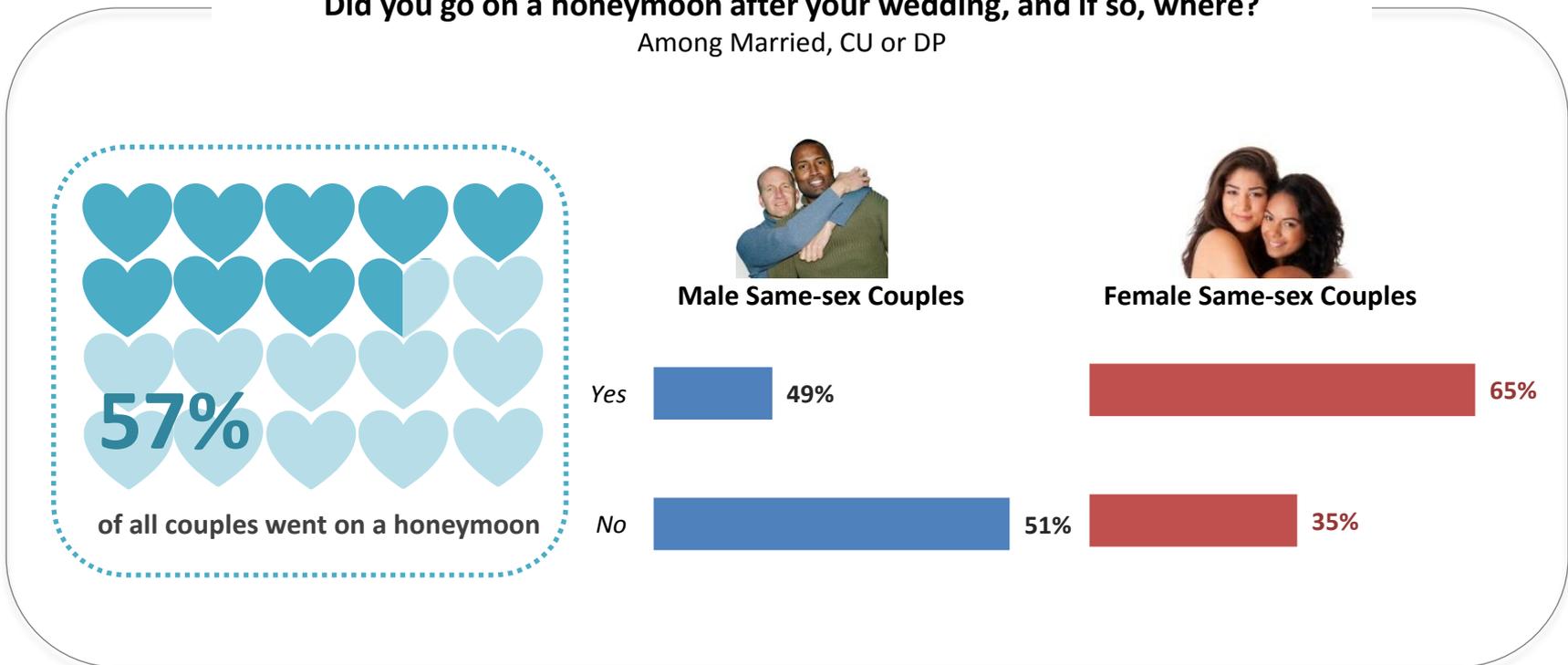


Base: Male Same-sex Couples n=198; Female Same-sex Couples n=147

A slight majority (57%) of same-sex couples indicated going on a honeymoon after their ceremony. There was no clear winner for honeymoon destinations. Responses varied widely across the United States, Canada and Europe. The destination with the highest number participants was Hawaii, but that only represented 7% of couples.

Did you go on a honeymoon after your wedding, and if so, where?

Among Married, CU or DP

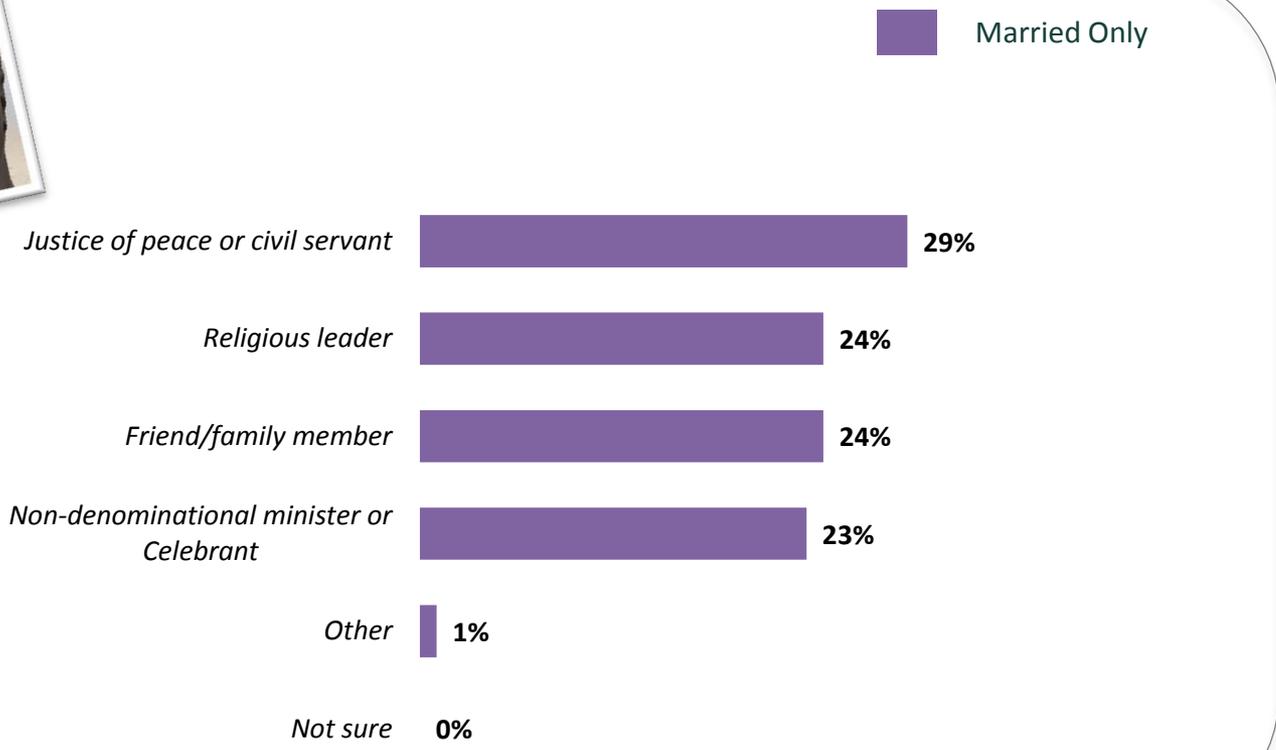


Base: Married, CU or DP: All LGBT n=360; Male Same-sex Couples n=198; Female Same-sex Couples n=147

The type of officiant used for same-sex weddings is quite varied. Religious leaders were chosen for only about a quarter of same-sex weddings.



Who was the officiant at your wedding?

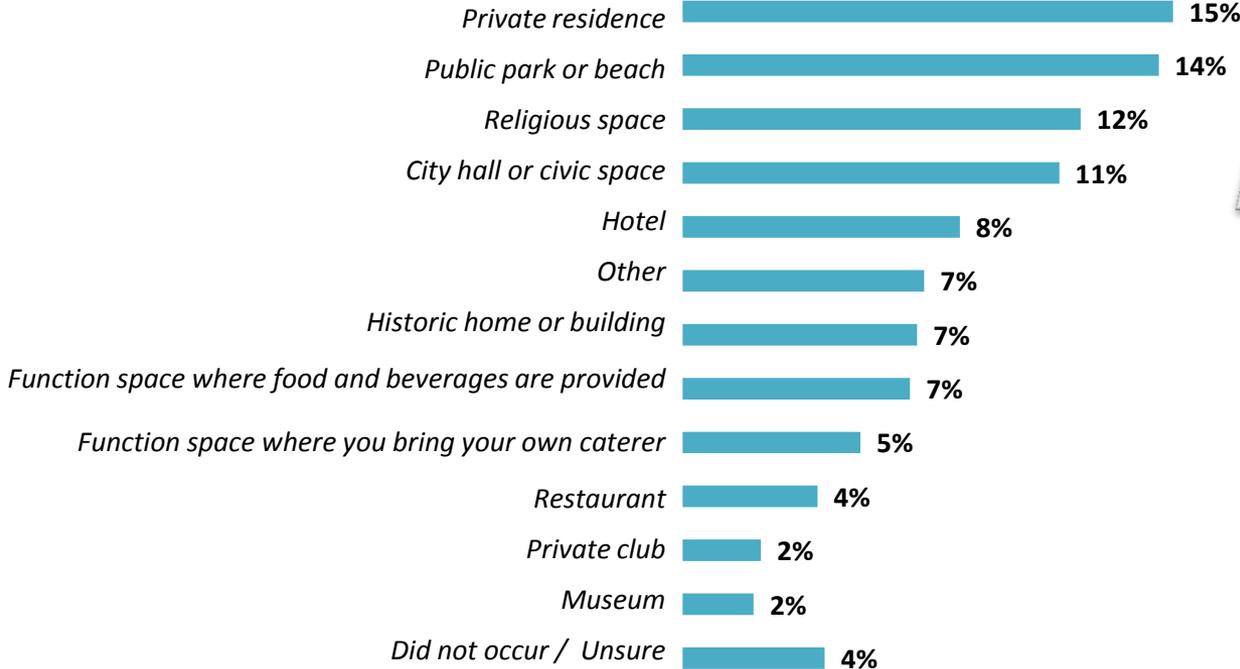


Base: Married Only n=304

Same-sex couples use a wide variety of locations for their ceremony. No one type appears to be a favorite in the LGBT community.

Where was your ceremony held, or where will it be held?

Among Married, CU, DP or Engaged



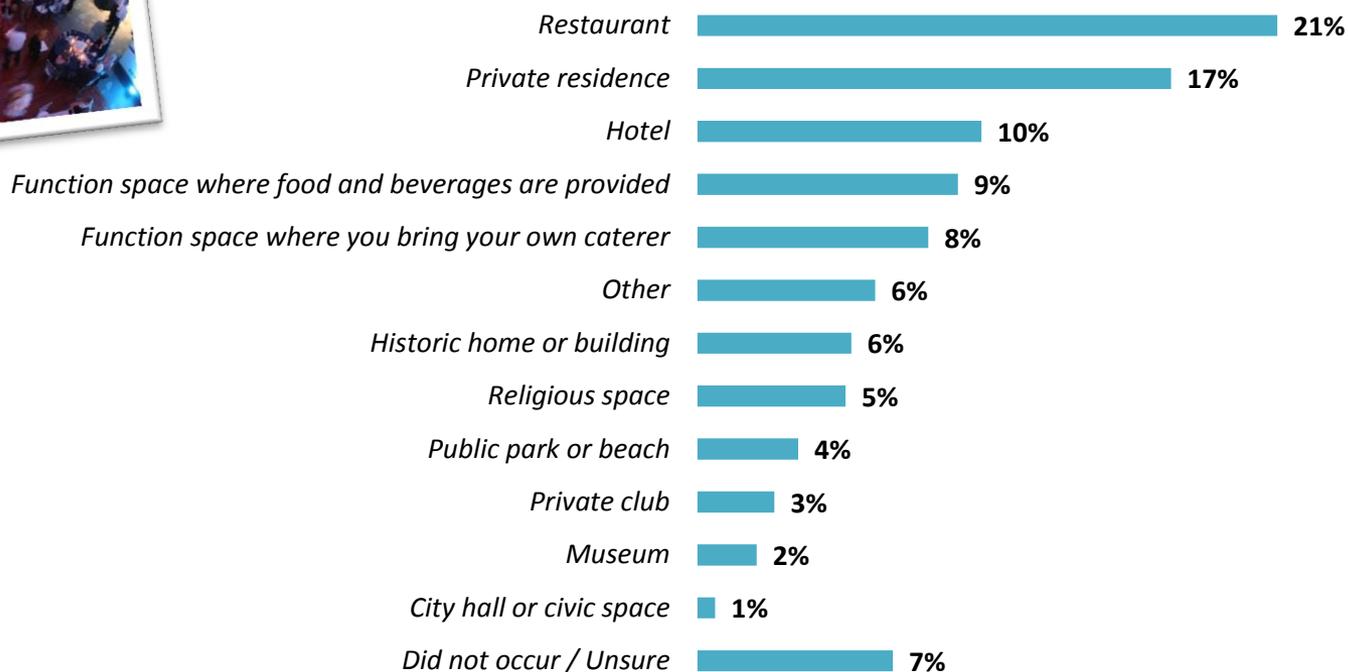
Base: Married/CU/DP/Engaged n=468

Similarly, same-sex couples use a wide variety of locations for their reception. No one type appears to be the clear favorite.



Where was your reception held or where will it be held?

Among Married, CU, DP or Engaged

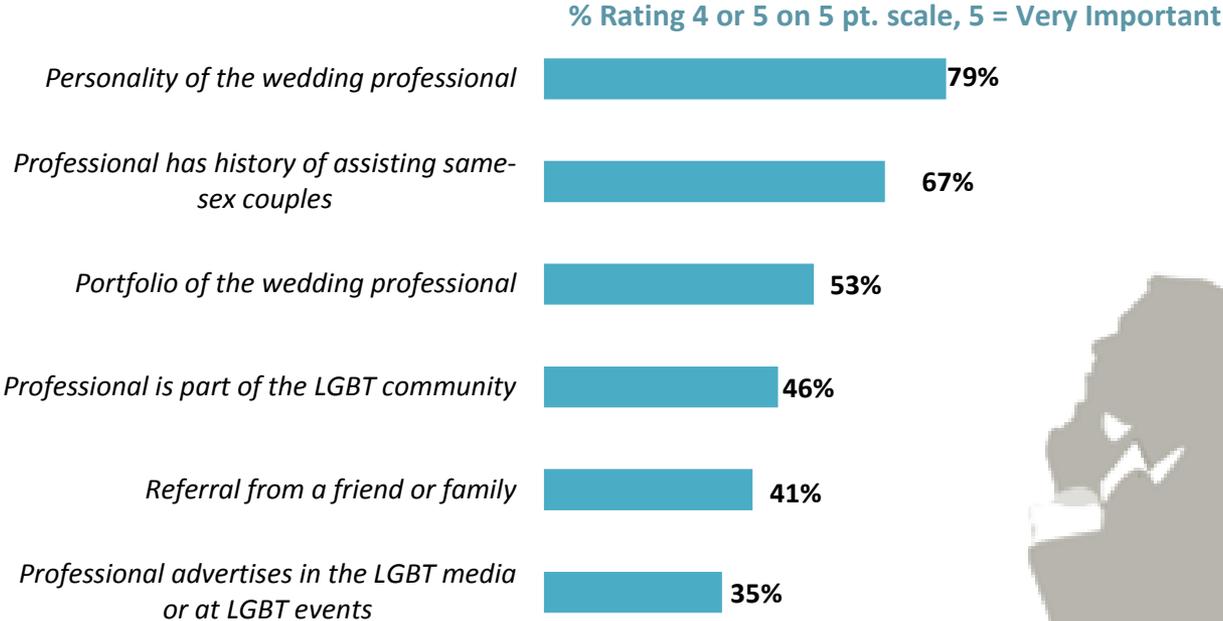


Base: Married/CU/DP/Engaged n=466

The personality of a wedding professional and their experience with same-sex weddings are the two most important factors when selecting a wedding professional.

On a scale of 1-5, how important was the following when selecting a wedding planner or professional to assist you with the ceremony?

Among Married, CU, DP or Engaged



Base: Married/CU/DP/Engaged n=223

Same-sex couples are primarily finding wedding professionals by word of mouth, LGBT wedding directories and search terms.

How did/will you find the vendors to help with your wedding plans?

(Mark all that apply)

Among Married, CU, DP or Engaged

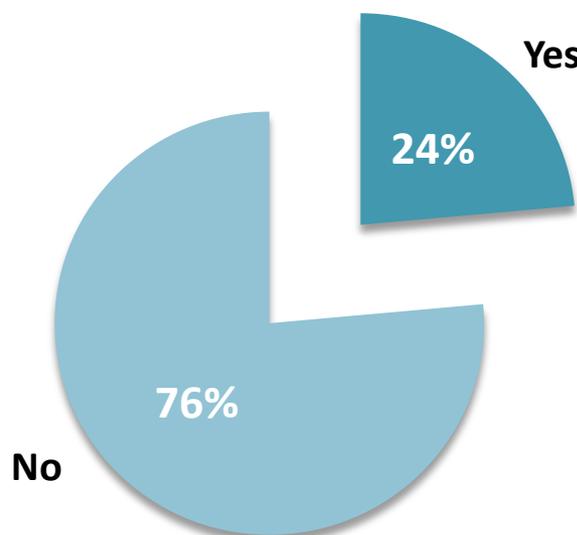


Base: Married/CU/DP/Engaged n=468

About a quarter of survey participants indicated awkwardness when working with wedding vendors. However, this low figure is at least partially due to same-sex couples seeking LGBT peer referrals and media to avoid discrimination and heterosexism.

Write-in Question: In your wedding planning, did you experience any discrimination or awkwardness with vendors?

Among Married, CU, DP and Engaged



Many forms and websites assume that there is a "bride" in the wedding. Many assume that we have a "bridal" party. The hotel insisted on calling it a "bridal suite" despite being totally gay supportive in all other aspects. Hello, no brides here. Vendors need to adjust more quickly, using "wedding suite" or some other gender inclusive term.



Hotel for honeymoon had our room listed under Mr. & Mrs.



I cried when I went to fill out the form for the wedding site planner we were about to drop thousands of dollars for services with and it said, "Bride" and "Groom" and the planner was trying to explain that it didn't matter and he'd cross it off. It does matter.

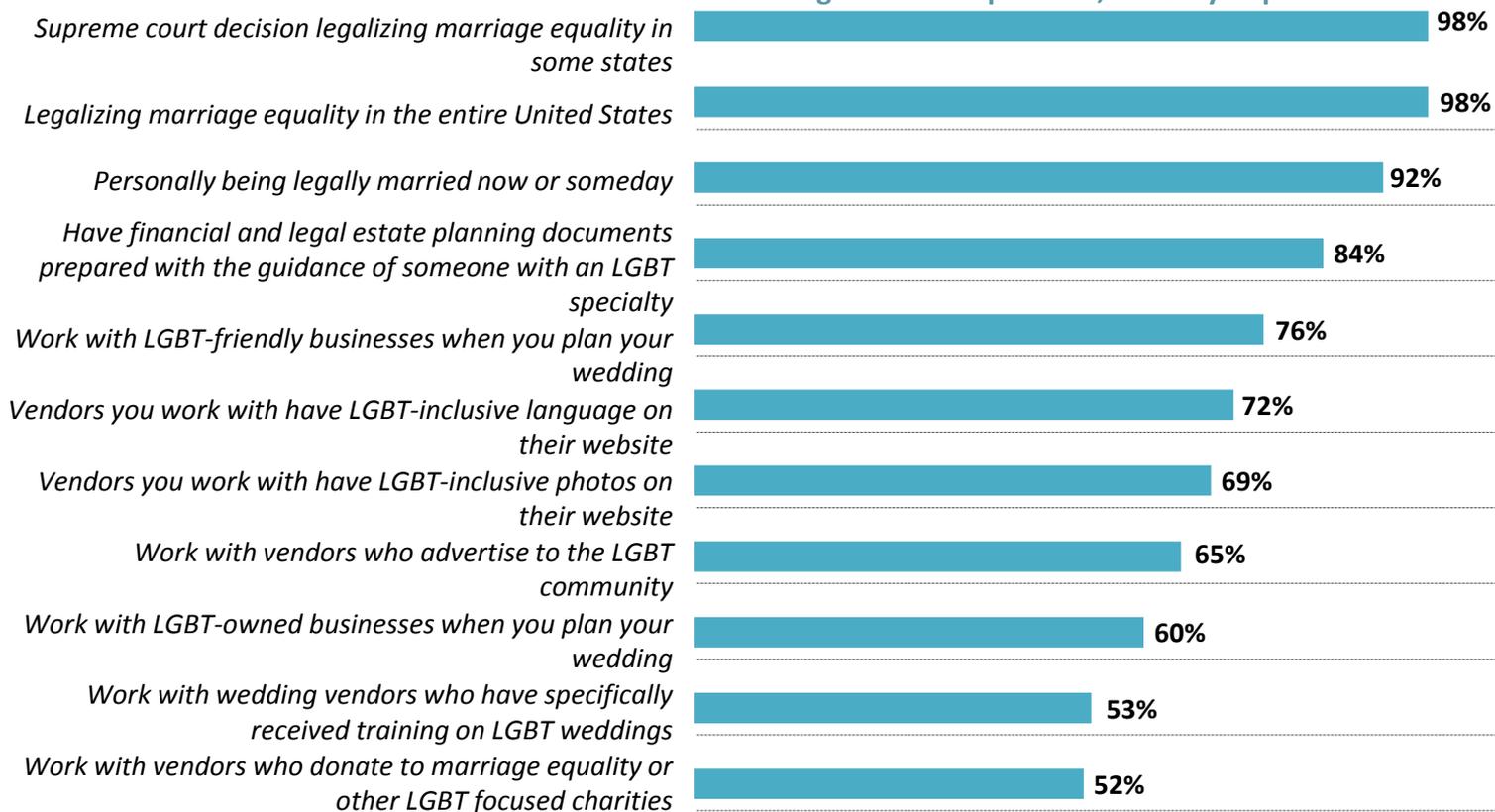
Base: Married/CU/DP/Engaged n=365

Same-sex couples consider the legal struggle to achieve full marriage equality as well as working with LGBT-friendly wedding vendors to be very important.

Please rate how important the following items are to you personally:

Among Married, CU, DP or Engaged

% Rating 4 or 5 on 5 pt. scale, 5 = Very Important



Base: Married/CU/DP/Engaged n=682

Same-sex couples find the terms “spouse” and “partner” preferable over the terms “husband” and “wife.” Only about half of respondents feel comfortable with the terms husband/wife, which is a relatively new concept for the LGBT community.

When you see the following terms to describe relationships in our community, how do you react to the terminology?

Among all couples

	 Positive	 Neutral	 Negative
<i>Spouse</i>	80%	18%	2%
<i>Same-sex couple</i>	72%	24%	3%
<i>Partners</i>	56%	33%	11%
<i>Husband / Wife</i>	54%	29%	17%
<i>Same-sex partners</i>	51%	34%	15%
<i>LGBT couple</i>	50%	39%	11%
<i>Domestic partners</i>	44%	40%	16%
<i>Life partners</i>	44%	37%	19%
<i>Same-gender couple</i>	37%	51%	13%
<i>Significant others</i>	32%	45%	23%
<i>LGBT partners</i>	31%	48%	22%
<i>Queer couple</i>	11%	25%	64%

Base: Married/CU/DP/Engaged n=682

Summary: Direction for Wedding Professionals

By asking nearly one thousand same-sex couples, we learned that the LGBT community views their wedding ceremonies and receptions very differently than the general population. That should not surprise anyone. The LGBT community has not had a long tradition of marriage, and gender roles have always played a big part in wedding planning.

How should wedding professionals respond to this information? Start by thinking about your niche within the LGBT wedding market. What specific demographic do you want to reach...Millennial lesbian brides? Baby boomer gay grooms? That should inform many of your marketing and communications decisions, and even the way you think about wedding traditions. As you've learned, the preferences and motivations of gay grooms are quite different than those of lesbian brides. We also learned the importance of having LGBT-inclusive language and photos on your website and in your marketing materials. About 70% of same-sex couples feel very strongly about that; so if you haven't already done so, make all of your marketing communications and imagery inclusive of all.

And put yourself out there – same-sex couples are actively looking for LGBT-friendly businesses. Planning a wedding can be a very emotional time, and like everyone, the LGBT community wants to feel safe when navigating these unfamiliar waters. That's why they are looking at online gay wedding directories, using LGBT-specific search terms and asking our peers for referrals.

In short, this stuff really matters.

Same-sex weddings can significantly boost the wedding industry, and the LGBT market has the potential to significantly impact your business in a major way. Same-sex weddings are often joyful, fun and creative, partially because without the limitations of tradition, same-sex couples can set our own rules for the ceremonies. We hope the results of our survey are enlightening and inspiring to your own wedding business.

Thank You...

For more information

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**“Community Marketing & Insights,
the San Francisco-based LGBT consumer research firm.”**

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
- Esurance (an Allstate Company)
- Gilead Pharmaceuticals
- 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

CMI'S LGBT

CONSUMER RESEARCH PANEL 2013-14

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 & Insights 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 & 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, 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. 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

47% LIVE WITH PARTNER

55% COLLEGE GRADUATES

68% ARE EMPLOYED

60% HHI >\$50K

6% PURCHASED A HOME IN THE PAST 12 MONTHS

7% PLAN TO PURCHASE A HOME IN THE NEXT 12 MONTHS

39% PURCHASED A SMARTPHONE IN THE PAST 12 MONTHS

24% PLAN TO PURCHASE A SMARTPHONE IN THE NEXT 12 MONTHS

39% DRINK WINE WEEKLY

39% DRINK BEER WEEKLY

45% DRINK SPIRITS OR COCKTAILS WEEKLY

PAST 12 MO. PURCHASES

40% MAJOR VACATIONS

18% AUTOMOBILE

39% SMARTPHONE

19% LAPTOP COMPUTER

23% HDTV

30% FURNITURE

22% TABLET COMPUTER

63% PERFORMING ARTS TICKETS

15% MAJOR KITCHEN APPLIANCES

12% E-READER

25% LGBT FUNDRAISING GALA TICKETS

40% "LIKED" A BUSINESS ON FACEBOOK

65% READ LGBT BLOGS / WEBSITES

31% CLICKED ON A FACEBOOK AD

15% CLICKED ON A MOBILE APP AD

60% MAKE REGULAR DONATIONS TO 1+ NON-PROFITS OR CHARITIES

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.