

# CMI's 5<sup>th</sup> Survey on LGBT Business & Commerce

**Community Marketing & Insights**  
*in partnership with*  
**National Gay & Lesbian Chamber  
of Commerce (NGLCC)**

**5<sup>th</sup> Edition**  
**July 2015**



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

# ABOUT US

OVER 20 YEARS OF LGBT INSIGHTS



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



*CMI produces LGBT research, training and communications support for these and other companies, universities and government organizations...*



E&J Gallo Winery



MillerCoors



# RESEARCH DESIGN

## OVER 20 YEARS OF LGBT INSIGHTS

### Who Did We Survey?

CMI screened our proprietary LGBT panel members seeking participants who either own their business, or are employed by a company and have decision-making authority for purchasing on behalf of the employer.

Panelists meeting these criteria completed the online survey:

- LGBT business owners N=547
- LGBT employees with decision-making authority for purchasing on behalf of the employer N=615

### What Was the Methodology?

- › 10 minute online survey conducted in June and July 2015.
- › Respondents were entered into a drawing for one of ten \$50 prizes (in cash, or donated to the charity of their choice) in recognition of their time to participate in the study.



# Part 1

## LGBT Business Owners

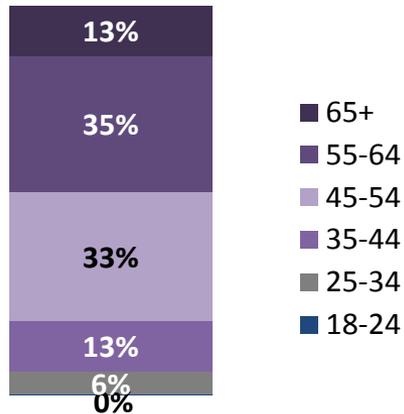


# LGBT Business Owners Panel • N=547

## HOUSEHOLD INCOME



## AGE



## IDENTIFIES AS...



**Gay and Bisexual Men**

**73%**



**Lesbians and Bisexual Women**

**25%**

Transgender 3%  
Queer 5%

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

## PRIMARY BUSINESS (2% of higher)

Arts / Design / Creative	15%
Real Estate	10%
Consulting	8%
Healthcare / Hospital / Medical	8%
Retail	7%
Advertising / Marketing / Public Relations	5%
Hospitality / Tourism / Travel Services	4%
Construction / Trade / Skilled Labor	3%
Education and training	3%
Information technology	3%
Legal	3%
Finance / banking / insurance	2%
Food services / restaurants	2%
Non-profit / Human Services	2%

**Note:** In 2015, the annual survey outreached to a greater number of LGBT Business Owners outside of local LGBT Chamber networking circles.

In 2014, 32% were LGBT Chamber members. compared to 21% in 2015.

Base: Total Business Owners n=547



# LGBT Business Owners Panel • N=547

70%



- › Small business / consultant
- › 0 to 2 employees
- › Primary source of income

20%



- › Small business owner
- › 3+ employees
- › Primary source of income

10%



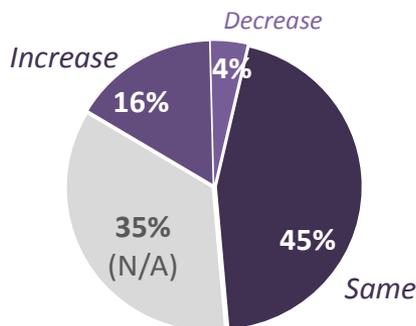
- › Primary income is from another full or part-time job
- › This is a side business for additional income
- › Not currently employed
- › This is a side business for additional income

### CURRENT STAFF

### EMPLOYEES

No Employees	55%
1-5	31%
6-10	7%
11-20	4%
21+	3%

### STAFF GROWTH (PAST YEAR)



### ANNUAL REVENUE

Under \$500,000	82%
\$500,000 to \$1 million	8%
\$1-2.4 million	6%
\$2.5-4.9 million	2%
\$5 million +	2%

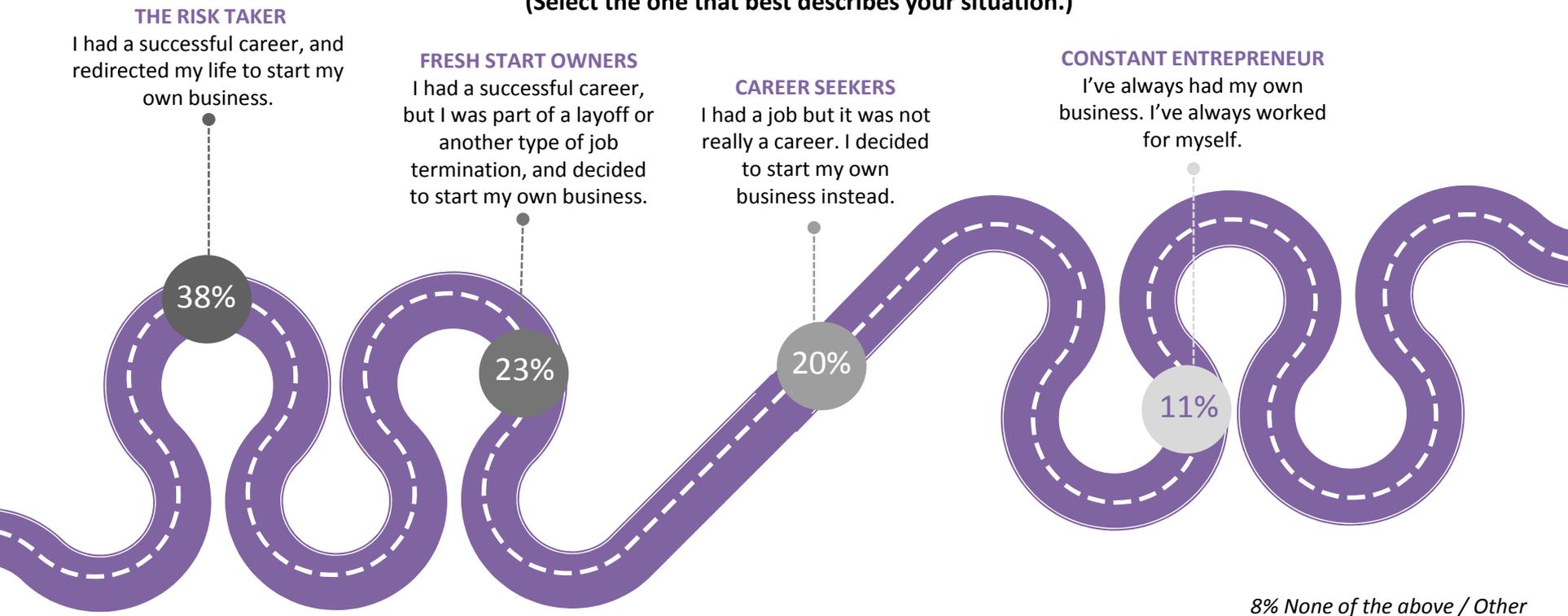
Base: (Bases Vary by Question)

## LGBT Business Owners

As a new question series in 2015, we wanted to understand the motivations for starting an LGBT-owned business. While the results varied, 38% of LGBT Business Owners indicated that they had a successful career and redirected their life to start their own business, and 23% started their business after a layoff or job termination.

### THE ROAD TO BUSINESS OWNERSHIP

Did you leave an existing career to start your own business?  
(Select the one that best describes your situation.)



8% None of the above / Other

Base: Total Business Owners n=488

## LGBT Business Owners

The questions below were asked to understand the assistance received when LGBT Business Owners first started their business. The vast majority indicated self-reliance, with little help outside their direct peer circles; financially or practically.

### THE ROAD TO BUSINESS OWNERSHIP

Who or what helped you start your business...  
(Please mark all that apply.)



#### FINANCIALLY

<b>I financially started my business on my own</b>	<b>79%</b>
<b>Partner or spouse</b>	<b>22%</b>
Parent	10%
Friend	5%
Other person	4%
Coworker or work colleague	2%
Other type of organization	2%
U.S. Small Business Administration	1%
Other government organization	1%
Other business owner or entrepreneur	1%
Angel investor	1%
Venture capital	1%



#### PRACTICAL ADVICE AND/OR EMOTIONAL SUPPORT

<b>I started my business on my own with little support</b>	<b>48%</b>
<b>Partner or spouse</b>	<b>40%</b>
<b>Friend</b>	<b>24%</b>
Coworker or work colleague	15%
Parent	13%
Other business owner or entrepreneur	11%
Other person	9%
Industry association	4%
Other type of organizations	4%
U.S. Small Business Administration	3%
LGBT organizations	1%

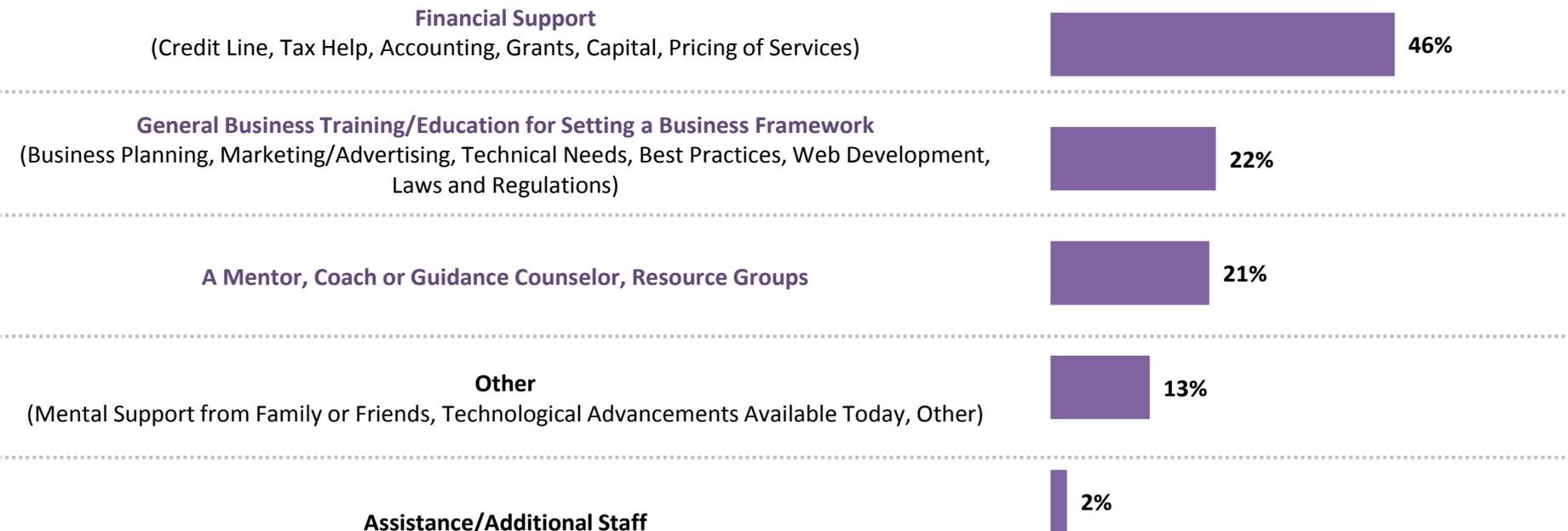
Base: Total Business Owners n=488

## LGBT Business Owners

When starting their business, LGBT Business Owners' top wish was financial support. They also indicated a need for general business training and education, as well as a mentor.

### THE ROAD TO BUSINESS OWNERSHIP

In a sentence or two... What kind of help do you wish you had when you started your business?



Base: Business Owners n=225

## LGBT Business Owners

Today, LGBT Business Owners still wish they had financial support for their business (but a smaller percentage than when they started their business). LGBT Businesses Owners expressed a current need for education, and support with sales and marketing.

### THE ROAD TO BUSINESS OWNERSHIP

In a sentence or two... What kind of help do you need now, in order to make your business grow?



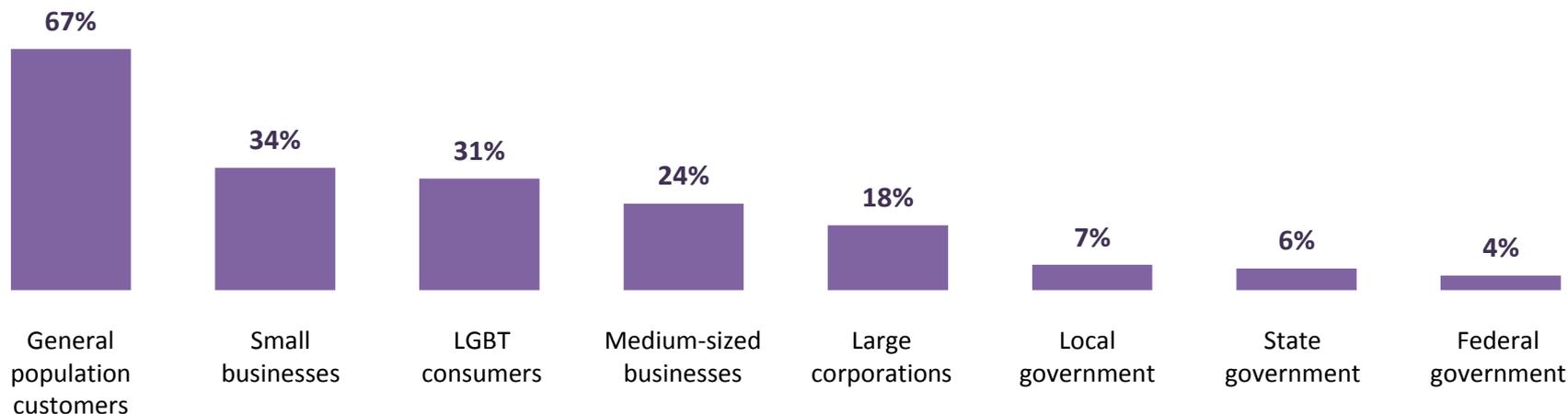
Base: Business Owners n=234

## LGBT Business Owners

Most LGBT-owned businesses (67%) view the general population as their primary customers. However, 31% view LGBT consumers as their primary customer base. Of note, more perceive small and medium sized companies as their customer base than large corporations or government.

### Primary Customers of LGBT-owned Business

Who are the primary customers of your business (i.e. sources of revenue for your business)? Mark all that you consider significant to the business.

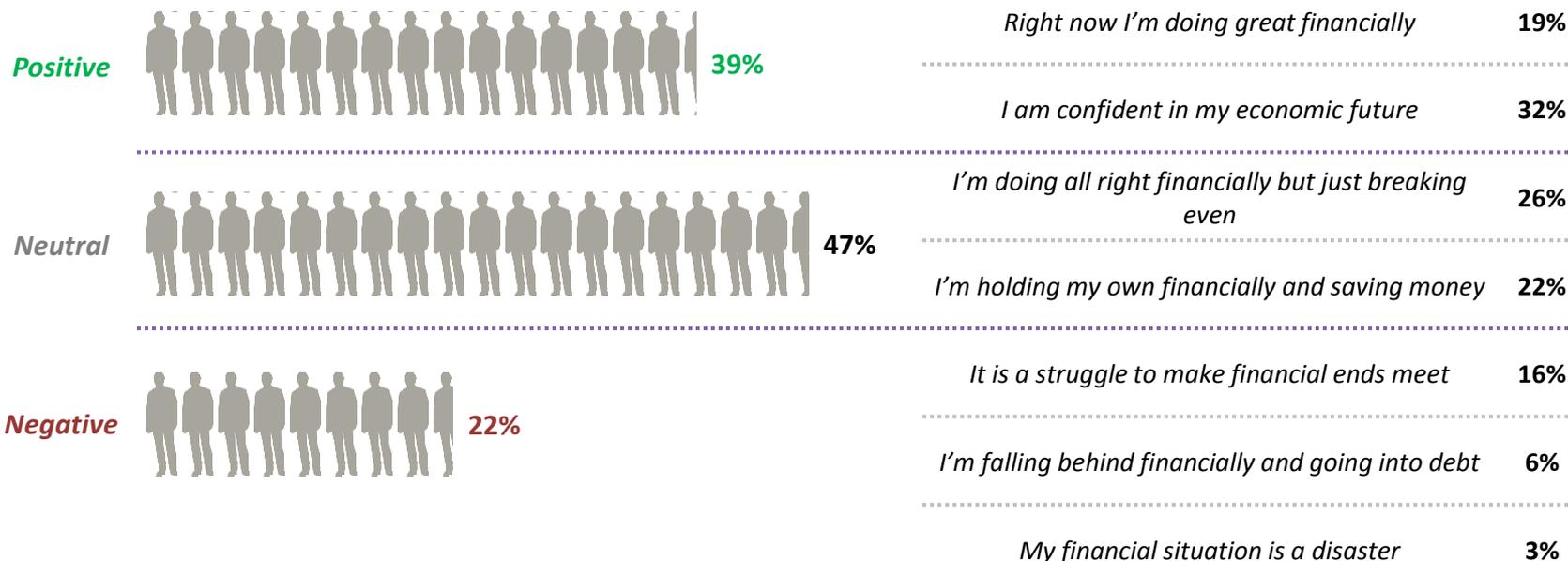


Base: Total Business Owners n=489

## LGBT Business Owners

Most LGBT business owners describe their current personal financial situation as neutral to positive. Only 22% described their current personal financial situation negatively.

How would you describe your current personal financial situation? (Select all that apply to you)



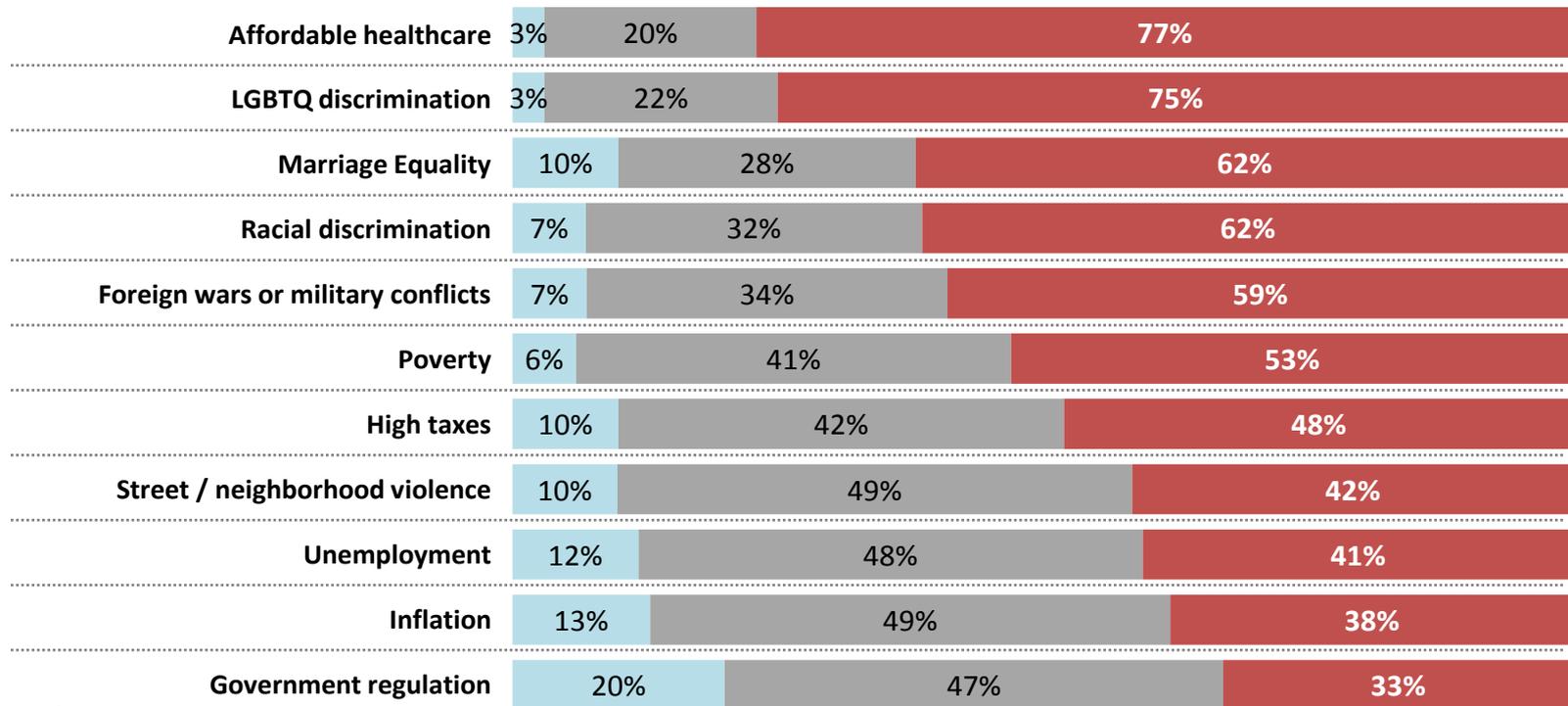
Base: Business Owners n=541

## LGBT Business Owners

When LGBT business owners were asked about political and social issues that concern them, responses were similar to 2014, with the exception of an increase in concern about racial discrimination. Healthcare costs remained the highest concern. Overall, discrimination issues are far more important to LGBT business owners than government regulation. Marriage equality numbers may have been influenced by the survey being fielded two weeks before and two weeks after the 2015 Supreme Court decision.

On a 5-point scale, which of the following political and social issues are you most concerned about?

(1) Not Concerned (2-3) Somewhat Concerned (4-5) Very Concerned



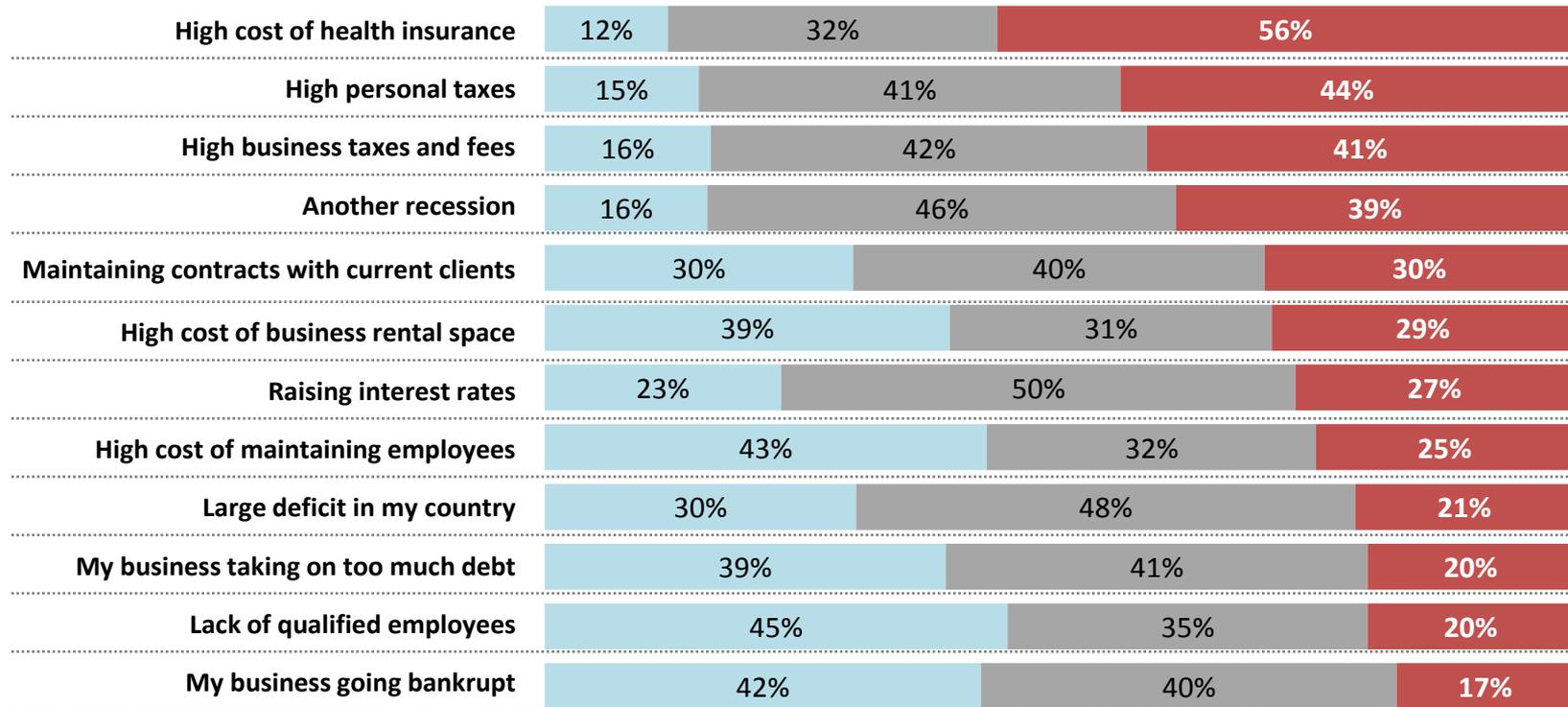
Base: Bases Vary by Issue

## LGBT Business Owners

Since 2014, concerns about business financial issues decreased or remained steady for nearly all response categories, except one: There was an increase in anxiety about the high cost of health insurance, and health insurance remains the top concern of LGBT-owned businesses.

On a 5-point scale, how concerned are you about the following financial issues affecting the financial life of your business? (If not applicable, check not concerned at all)

(1) Not Concerned (2-3) Somewhat Concerned (4-5) Very Concerned



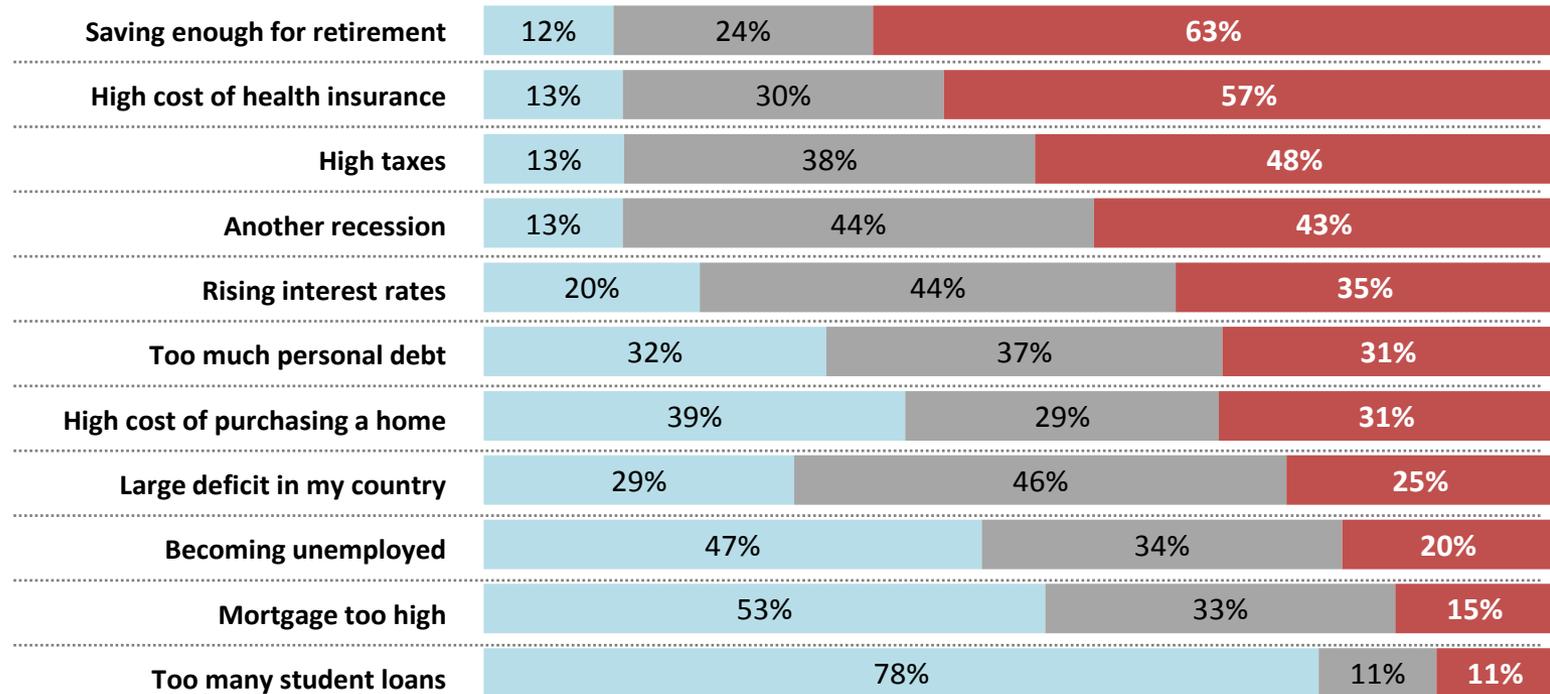
Base: Bases Vary by Issue

## LGBT Business Owners

When LGBT Business Owners are asked how issues affect their personal financial life, most response categories increased by a couple of percentage points (in contrast to business concerns, which decreased). Also of note, the new response of saving enough for retirement was the number one concern.

How concerned are you about the following financial issues affecting your own personal financial life? (If not applicable to your life, check not concerned)

(1) Not Concerned (2-3) Somewhat Concerned (4-5) Very Concerned



Base: Bases Vary by Issue

## LGBT Business Owners

### Interest in being an NGLCC-Certified LGBT-Owned Business Enterprise

In 2015, changes in outreach strategy resulted in a higher number of LGBT-owned business participants outside of the LGBT chamber network.

However, the result for interest in becoming an NGLCC-Certified LGBT-Owned Business Enterprise remained the same. In 2015, 9% indicated very likely and in 2014, 8% indicated very likely. There may be significant interest in NGLCC certification among LGBT Business Owners that are outside of local chamber networks.

#### Is your business a member of a local or regional LGBT Chamber of Commerce or LGBT Business Association?

Yes (2015 Rate)	<b>21%</b>
Yes (2014 Rate)	<b>32%</b>

#### Is your company an NGLCC-Certified LGBT-Owned Business Enterprise?

Yes (2015 Rate)	<b>10%</b>
Yes (2014 Rate)	<b>21%</b>

#### How likely is your business to seek certification as an LGBT-Owned Business Enterprise, knowing that major corporations are interested in buying products and services from LGBT-owned companies?

**9%** Very Likely

- Didn't know that certification was an option previously.
- Currently in the process of becoming certified.

**44%** Need More Information to Decide

- Unaware of certification and the potential benefits.
- Skeptical about the cost and difficulty of becoming certified.
- Uncertain of certification relevance to business type.

**47%** Not Likely

- Not applicable to business type; many stating that their company is not B2B oriented.
- Fail to see value of certification.

Base: Total Business Owners n=400

## LGBT Business Owners

**18% of LGBT-owned businesses indicated that they work with customers outside of the United States. 21% of those that do not export are interested in learning more about exporting.**

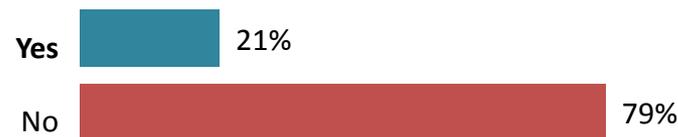
### Exports

Has your company ever exported its product or service outside of the United States?

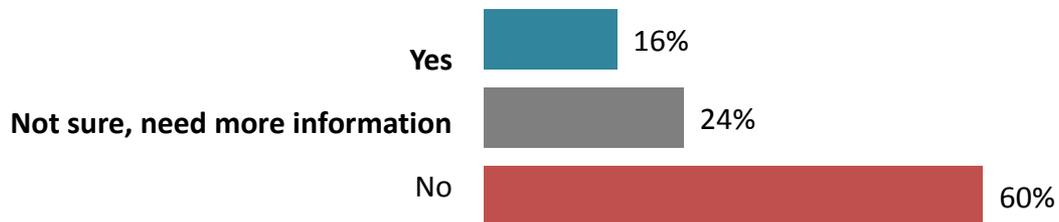
**Yes**  
**18%**



Would your company be interested in exporting if you had the right assistance?  
*(Among those who currently do not export)*



Would your company be interesting in participating in NGLCC-led trade missions to find importers, partners, and customers for your product or service in other countries?  
*(Among those who currently do not export)*



Base: Total Business Owners n=491

## LGBT Business Owners

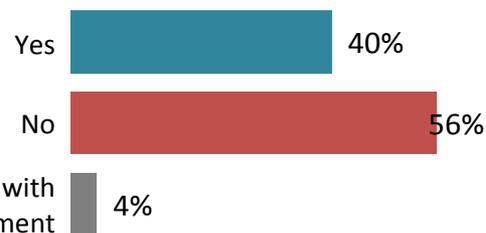


### Doing Business with the Federal Government

Would you be interested in contracting with the Federal Government if you had the right knowledge of how to do so?



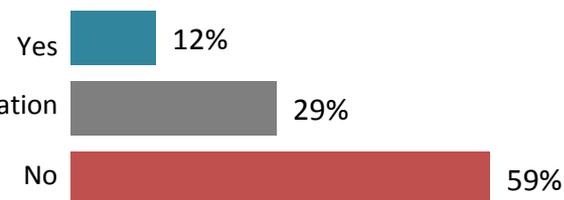
My company already has a contract with the Federal Government



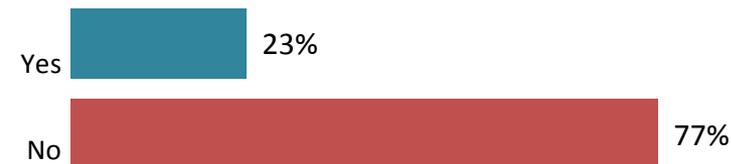
Would you be interested in attending the NGLCC Policy and Procurement Forum on November 19-20 in Washington, DC?



Not sure, need more information



Are you familiar with the Federal GSA Schedule for becoming a federal contractor?

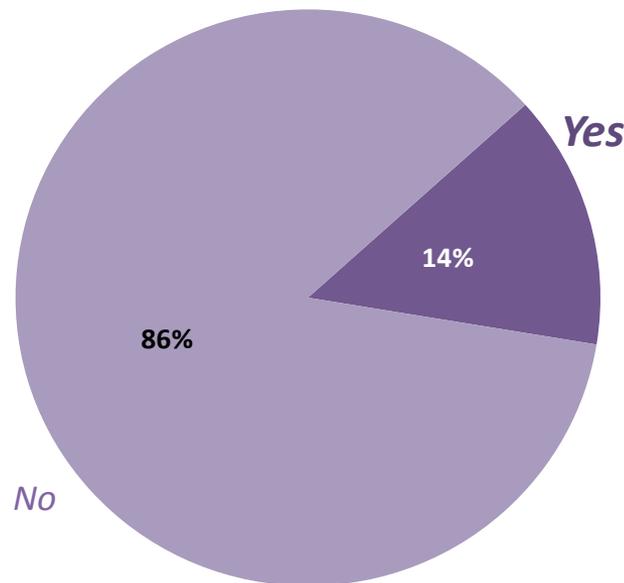


Base: Total Business Owners n=400

## LGBT Business Owners

**14% of LGBT business owners started their businesses specifically to fill a product or service need in the LGBT community, and/or create a workplace where LGBTs are welcome and policies are LGBT-inclusive.**

In a sentence or two... Are there any LGBT-specific reasons that you decided to become a business owner?



**To fill a product or service need in the LGBT community or to help support the LGBT community through work 55%**

*"We wanted to serve LGBT individuals who were not being served well by other providers/companies."*

**To avoid discrimination, create a workplace where LGBTs are welcome and policies are LGBT-inclusive 45%**

*"I had to, since discrimination in employment was once rampant and I could not function in corporate America."*

Base: Total Business Owners n=88



## Part 2

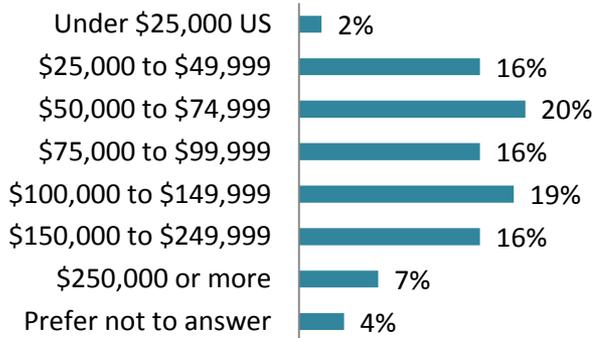
# LGBT Employee Decision-Makers



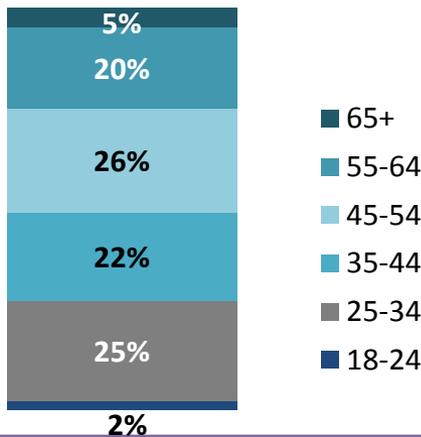
# LGBT Employee Decision-Makers Panel • N=615

Answered yes to the question, In your position at your place of work, do you influence and/or have decision-making authority for purchasing on behalf of the employer?

## HOUSEHOLD INCOME



## AGE



## IDENTIFIES AS...



Gay and Bisexual Men  
**63%**



Lesbians and Bisexual Women  
**34%**

Transgender 2%  
Queer 9%

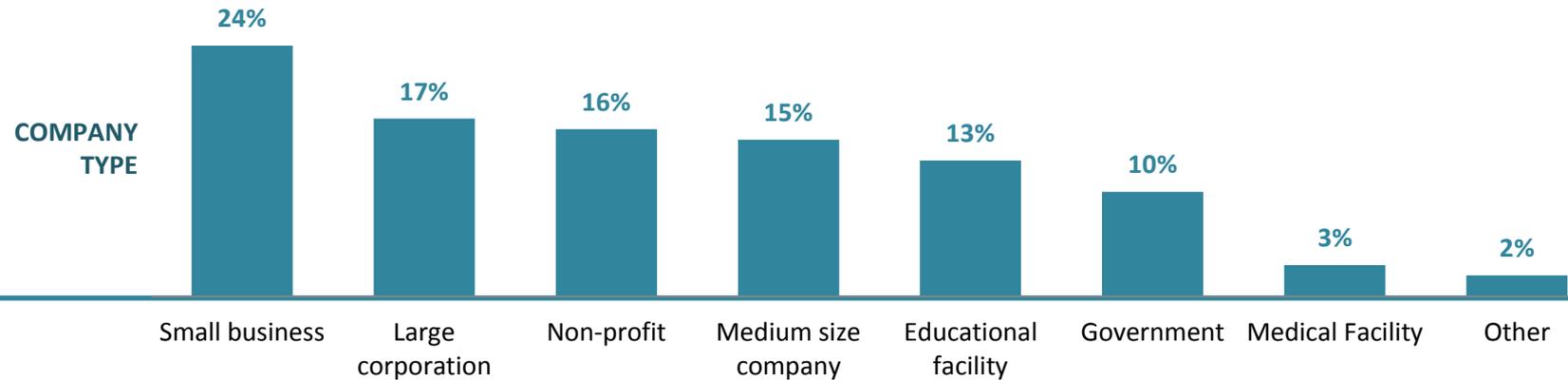
Total exceeds 100% as respondents were able to check multiple identities.

## PRIMARY BUSINESS (2% or higher)

Education and training	16%
Healthcare / Hospital / Medical	11%
Non-profit / Human Services	11%
Government / Public Administration	7%
Retail	7%
Other	7%
Arts / Design / Creative	4%
Finance / banking / insurance	4%
Manufacturing	4%
Advertising / Marketing / Public Relations	3%
Hospitality / Tourism / Travel Services	3%
Construction / Trade / Skilled Labor	2%
Food services / restaurants	2%
Information technology	2%
Legal	2%
Real Estate	2%
Research (Scientific/Medical)	2%
Software / database / programming	2%

Base: Decision-Makers n=615

# LGBT Employee Decision-Makers Profile



**Current Position**

Middle Manager	17%
Director	15%
Senior Manager	12%
Administrator	11%
Other	11%
General employee / staff	10%
Junior Manager	5%
Assistant / aide / clerk	4%
Supervisor	4%
Technician	4%
Engineer	3%
Representative	2%

**Annual budget under your control**



Base: Decision-Makers n=615

## LGBT Employee Decision-Makers Profile

**Most LGBT Employee Decision-Makers describe their current personal financial situation as neutral to positive. Only 10% described their financial situation negatively.**

How would you describe your current personal financial situation? (Select all that apply to you)



*Right now I'm doing great financially* **17%**

*I am confident in my economic future* **35%**

*I'm holding my own financially and saving money* **33%**

*I'm doing all right financially but just breaking even* **23%**

*It is a struggle to make financial ends meet* **7%**

*I'm falling behind financially and going into debt* **3%**

*My financial situation is a disaster* **1%**

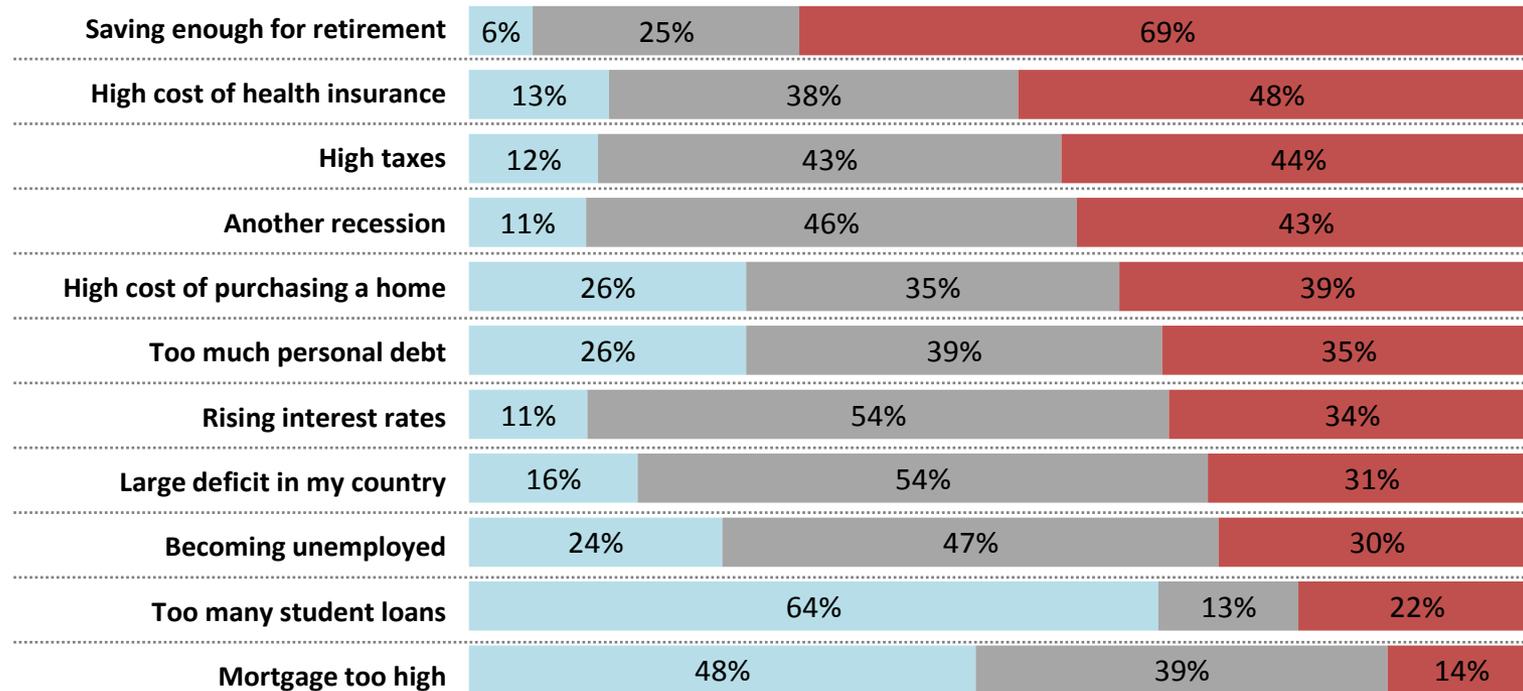
Base: Decision-Makers n=613

## LGBT Employee Decision-Makers

Among financial concerns, LGBT Employee Decision-Makers are most concerned about saving for retirement and the high cost of health insurance. However, retirement was far more of a concern than health insurance.

How concerned are you about the following financial issues affecting your own personal financial life? (If not applicable to your life, check not concerned)

(1) Not Concerned (2-3) Somewhat Concerned (4-5) Very Concerned



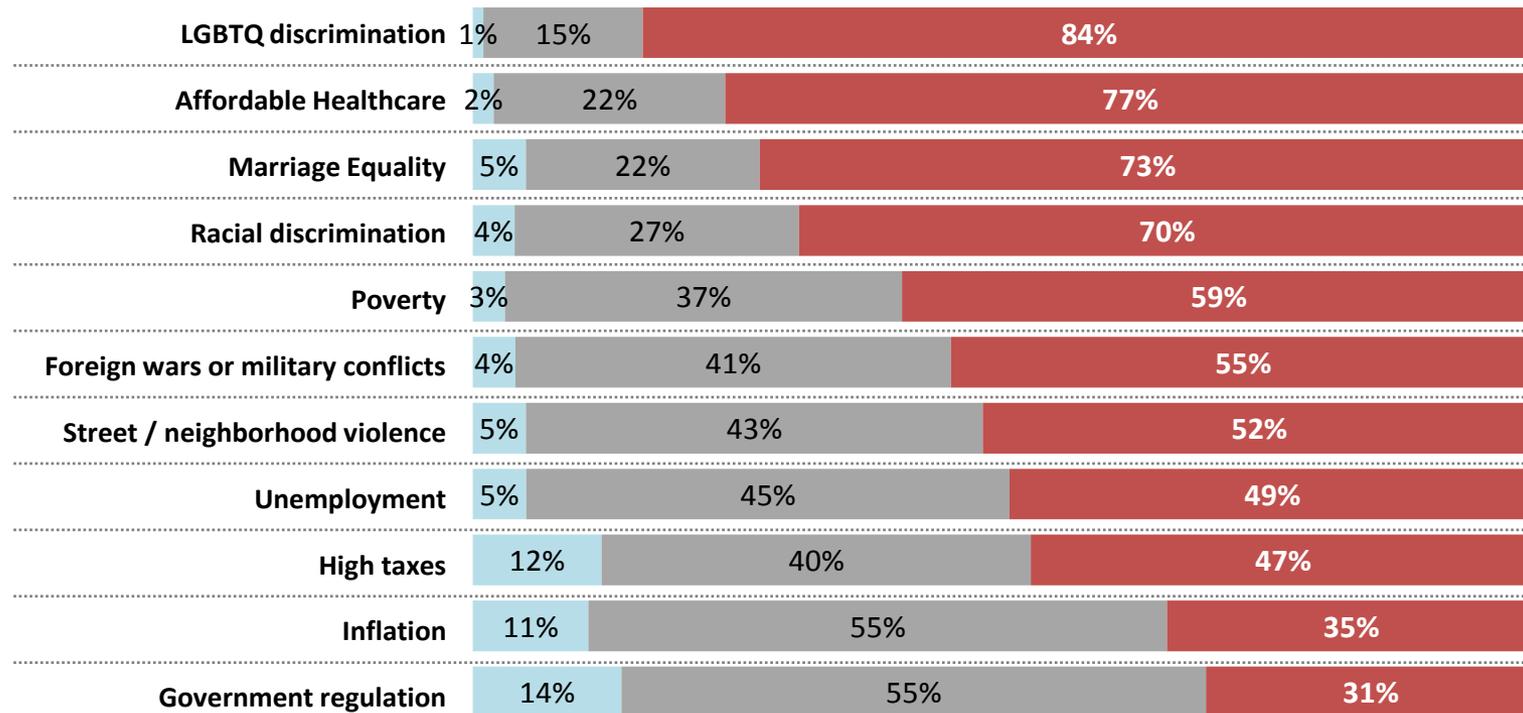
Base: Bases Vary by Issue

## LGBT Employee Decisions-Makers

Among social concerns, LGBT Employee Decision-Makers are most concerned about LGBTQ discrimination and affordable healthcare. Concern about racial discrimination increased significantly since 2014.

On a 5-point scale, which of the following political and social issues are you most concerned about? (If not applicable to your life, check not concerned)

(1) Not Concerned (2-3) Somewhat Concerned (4-5) Very Concerned



Base: Bases Vary by Issue

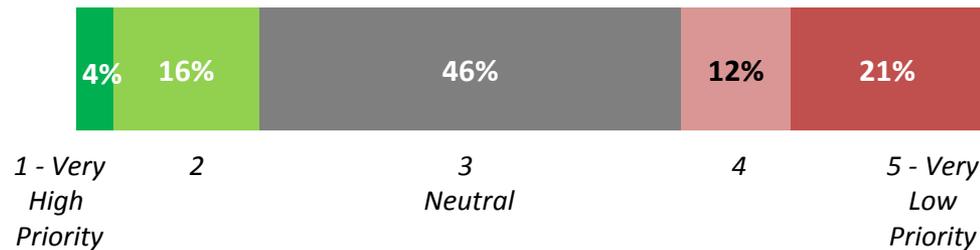
## LGBT Employee Decision-Makers

20% of the LGBT Employee Decision-Makers are actively researching and looking for LGBT-owned and LGBT-friendly companies, which is a decrease from past years. This may be an indication that decision-makers are more confident in their assumptions and past research.

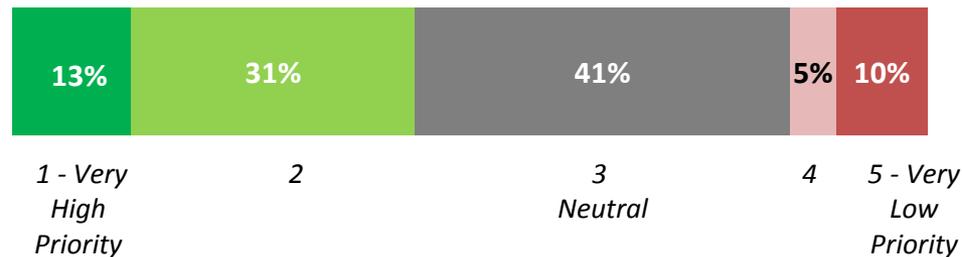
However, 44% of LGBT Employee Decision-Makers indicated that they have made it a priority to purchase products/services from LGBT-owned and/or LGBT-friendly vendors for their company. This percentage is similar to past years.

### LGBT-friendly Purchasing Priority Ratings

When purchasing at work, how much of a priority do you make researching LGBT-owned and/or LGBT-friendly vendors for your company?



Once you have identified LGBT-owned and/or LGBT-friendly vendors, how much of a priority do you make to purchase products/services from LGBT-owned and/or LGBT-friendly vendors for your company?



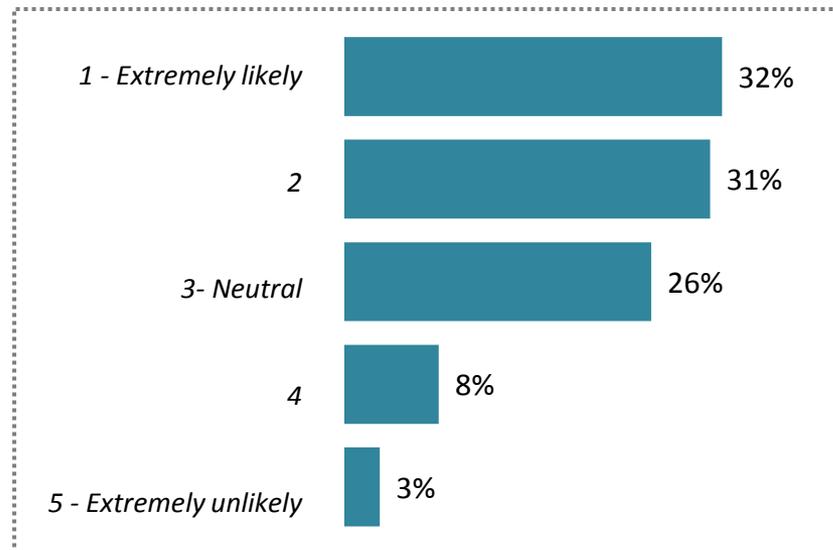
Base: Decision-Makers n=615

## LGBT Employee Decision-Makers

The study indicates that greater education and easier access to information could increase the percentages of LGBT Employee Decision-Makers who make it a priority to purchase products/services from LGBT-owned and/or LGBT-friendly vendors. 63% might make it a priority if they had more information.

### LGBT Purchasing Priority Ratings

If you had access to, or were aware of, a resource for finding LGBT-owned and LGBT-friendly companies, would you use it when making purchasing decisions at work? (i.e. equal employment policies including LGBT, provides equal benefits to same-sex couples, etc.)



Base: Decision-Makers n=605

## LGBT Employee Decision-Makers

By far, LGBT Employee Decision-Makers indicated that equal and inclusive benefits and policies were the top criteria for determining if a company is LGBT-friendly. LGBT community support also ranked high.

In your mind, what makes a corporation or company "LGBT-friendly?"  
List up to three criteria.



Equal and Inclusive Benefits and Policies

96%



LGBT Community Support  
(Involvement and Charitable Contributions)

43%



Corporate Culture, Diversity Commitment Statements and  
Sensitivity in Communications

27%

Diverse Marketing and Advertising  
(LGBT Inclusive Ads, LGBT Specific Imagery, Ads Placed in LGBT Media)

25%



LGBT Employee Visibility, Resources and Active Recruiting

16%



Base: Decision Makers n=525

## LGBT Employee Decision-Makers

**LGBT Employee Decision-Makers were just as likely to determine if a company is LGBT-friendly by their marketing outreach strategies as their affiliation with LGBT business organizations. This indicates the need to have LGBT-friendly employment policies, join LGBT business groups and then directly tell the LGBT community about those policies.**

You indicated that you use resources to find LGBT-owned and LGBT-friendly companies.  
Please list up to 3 resources that you use below.

NGLCC / Local Chamber of Commerce / LGBT chambers / LGBT Business Directories / HRC / HRC Equality Index	<b>54%</b>
LGBT Specific Media / Ads in LGBT Media	<b>44%</b>
General Web Searches	<b>43%</b>
Word of Mouth / Referrals / Friends or Family	<b>20%</b>
Marketing / Advertising in General / Media (Not LGBT-specific)	<b>13%</b>
Networking / Social Media	<b>8%</b>
LGBT Organizations / Charity or Non-Profit Involvement / Donations and Sponsorships (Pride, GLAAD, Marriage Equality, etc.)	<b>6%</b>

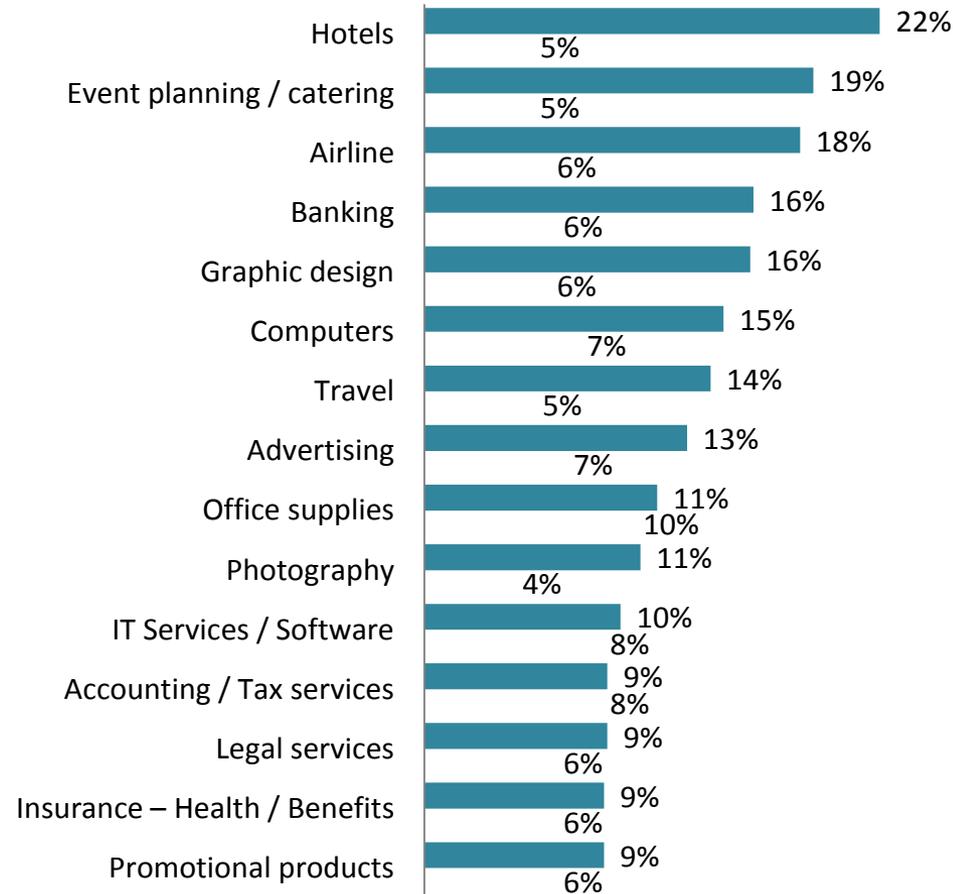
Base: Decision Makers n=142

## LGBT Employee Decision-Makers

For the purchases that you personally control, what products and services has your company sourced from LGBT-owned or LGBT-friendly vendors in the past year?

Slide 1 of 2

- Sourced from LGBT or LGBT-friendly Company
- Tried, but could not find LGBT-friendly option



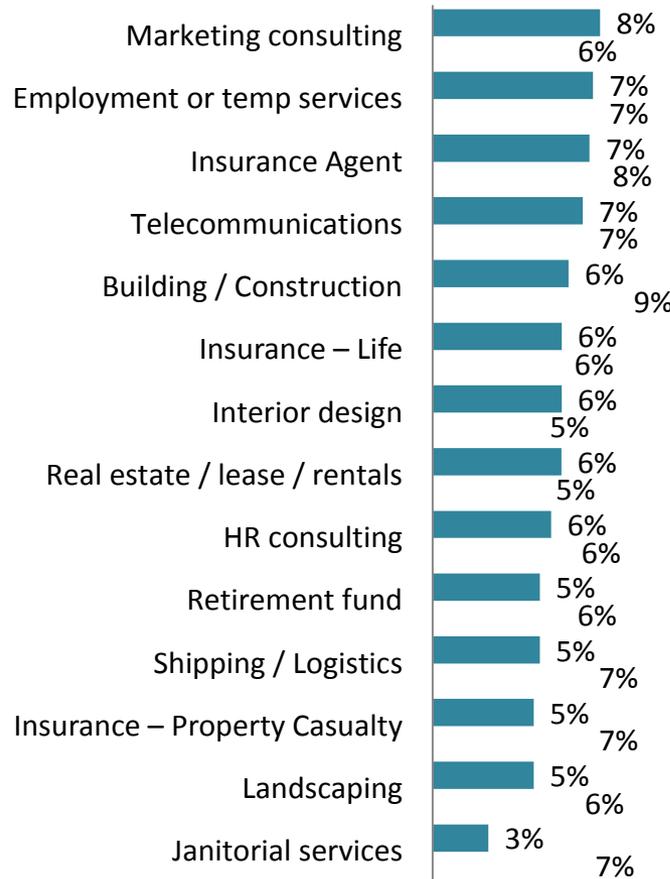
Base: Decision-Makers n=615

## LGBT Employee Decision-Makers

For the purchases you personally control, what products and services has your company sourced from LGBT-owned or LGBT-friendly vendors in the past year?

Slide 2 of 2

- Sourced from LGBT or LGBT-friendly Company
- Tried, but could not find LGBT-friendly option



Base: Decision-Makers n=615

# THANK YOU!



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LGBT Owned Business Enterprise.*



# ABOUT CMI'S LGBT RESEARCH PRACTICE

Founded in 1992, Community Marketing & Insights (CMI) is a full-service market research firm, focused on LGBT insights and analytics.

Market research studies and resulting insights and action items are meant to help marketers understand the LGBT communities, and influence sales, marketing and outreach decisions. However, not all research is the same. Community Marketing & Insights' (CMI) methodologies and experience are distinct from other research companies when considering approaches, survey respondent sources—and ultimately—the validity and utility of sought-after results.

Community Marketing & Insights (CMI) has been conducting LGBT consumer research for over 20 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards in North America, Europe and Asia. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, product development, measurable marketing planning and assessment of return on investment.

CMI's research findings have been published in the New York Times, Wall Street Journal, Forbes, Washington Post, Chicago Tribune, Los Angeles Times, USA Today, Chicago Tribune, Miami Herald, CBS News, CNN, NPR, Reuters, Associated Press and many other international, national and regional media.

CMI's research and corporate training clients span the globe, and include leaders from a wide range of industries. CMI studies have been produced for these and many other B2B and B2C brands: Aetna, Inc.; Prudential Financial; Wells Fargo; DIRECTV, LLC; Viacom/Logo; Johnson & Johnson; WNBA; Hallmark Cards, Inc.; Target Brands; E&J Gallo Winery; Gilead Pharmaceuticals; Better Homes & Gardens Real Estate; The Walt Disney Company; TELUS Corporation; Hyatt Hotels Corporation; Hawaiian Airlines; NYC & Company; Las Vegas Convention & Visitors Authority; VISIT FLORIDA; Canadian Tourism Commission; Tourism Office of Spain; Japan National Tourism Organization; U.S. Census Bureau; Centers for Disease Control; American Cancer Society; Kaiser Family Foundation; University of Pennsylvania; City University of New York; and numerous other corporations, universities and organizations across North America and around the world.



## ABOUT THE CMI RESEARCH PANEL

Over the past 20 years, CMI has developed the world's most community-representative panel for a variety of LGBT research methodologies. Corporations, government agencies, non-profits, universities and other research firms all utilize CMI's panel resources because of its size and flexibility. CMI can assist with research projects requiring thousands of participants, and we can deliver on smaller projects requiring targeted segments within LGBT. For example, CMI was able to recruit for projects needing 1,200 men living with HIV, 200 LGBT African American Millennials in urban U.S.A., and 750 transgender community members. We also produce qualitative projects that are challenging—or impossible—for other research groups to achieve.

CMI has developed our panel through authentic partnership and trust within the LGBT community. CMI never uses the panel for sales or marketing purposes. Panel members have the direct email addresses of their project's Research Director. We protect panelist confidentiality, and we respond to study questions, concerns and feedback within 24 hours. Since CMI is a specialized LGBT-owned and operated company, established over 20 years ago, we have earned a level of confidence and trust that can only come from being members of the community. As distinct from other panel approaches, we actually have a very personal relationship with our panelists, who are willing to open up and honestly share genuine experiences, sensitivities, opinions and motivations with us. They know that the results from the research will be used for the betterment of the LGBT community.

### CMI'S PANEL CONSISTS OF OVER 70,000 SELF-IDENTIFYING LGBT COMMUNITY MEMBERS, WHICH INCLUDES:

- 50,000 LGBT panelists in the United States
- 6,500 LGBT Canadians (includes English and French speaking)
- 4,500 LGBT Chinese
- Capabilities in the UK, Germany, Australia and other countries

### IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBT SEGMENT

- 20,000 lesbian and bisexual women
- 30,000 gay and bisexual men
- 1,500 transgender community members
- 5,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 15,000 representing LGBT communities of color
- 15,000 LGBT Millennials
- Thousands of men living with HIV (Note: All health-related data is maintained independent of personally identifying information)
- Participants in all 50 states with ZIP code-level geographic targeting capability
- 10,000 with a master's degree or better
- 3,000 LGBT parents with a child under 18 living at home
- 5,000 legally married same-sex couples
- Experience with LGBT youth research (in partnership with an institution and IRB approval)

## CMI'S LGBT STRATEGIC PLANNING & CORPORATE TRAINING

**CONSULTING:** Evaluating your opportunities and strengths based on research findings, strategic consulting identifies brand and product positions that can lead to maximum success and return on investment. We'll also assess your corporate policies and practices—crucial to LGBT loyalty. LGBT consumers tend to vote with their wallets: they favor good corporate/community citizens.

**TRAINING:** The Community Marketing team has developed and presented custom on-site training for a wide variety of companies and organizations exploring their opportunities in the LGBT community. The trainings may include topics ranging from a basic introduction to the LGBT community, research, case studies and marketing opportunities...to diversity/sensitivity training best practices...to sales training and customer service.

*LGBT Community Survey and Community Marketing are registered trademarks of Community Marketing, Inc.*

*Minority/Diversity Procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT-Owned Business Enterprise.*



## CONTACT US

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# LGBT Market Research:

*There is a difference!*

LGBT research is meant to help marketers understand the LGBT community, and make educated decisions about strategies and tactics to reach them. Not all research is the same, however. At **Community Marketing & Insights**, we leverage unique experience, methodologies and our own proprietary panel to generate the valid and actionable results that our clients depend on.

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## CMI'S PROPRIETARY PANEL: WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has recruited for our proprietary consumer panel over the past 20+ years by partnering with over 300 LGBT media, organizations, events and social media throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is thus highly representative of LGBT consumers who interact with the LGBT community and media.

CMI research is trusted by—and frequently quoted in—The New York Times, USA Today, The Wall Street Journal, Chicago Tribune, Los Angeles Times, Miami Herald, Forbes, Ad Week, NPR, CNN, CBS News, Associated Press, etc.

*Other research providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate in a survey that they are gay or lesbian. They may also use lists from one or two LGBT publishers, which is likely to skew results.*

*If you are a marketer looking for valid LGBT consumer insights about products, services, or advertising creative and marketing strategies, “general market” panel development approaches are not likely to yield LGBT community members who interact with the media where you are placing ads.*

## CMI'S QUANTITATIVE SURVEYS: SIZE DOES MATTER

CMI has conducted hundreds of LGBT-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market.

Size does matter when it comes to surveys. Our panel has grown to over 70,000 qualified LGBT consumers—the largest of its kind, by far. Our Annual LGBT Community Survey® study has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

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.

*Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or “reinvent the wheel” at your expense.*

*It's not possible to fathom the diversity and complexities within LGBT (see below) through a small sample. And with small samples, you lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Atlanta? Generalities and sweeping statements about “the LGBT market” based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.*

## LGBT PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO “LGBT MARKET”

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

*General market surveys that may include a small subset of “the gay community” just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.*

## GET A DEEPER UNDERSTANDING OF THE LGBT COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. Quantitative (data) research is important, but it's just one side of the coin. Our full range of research services uncover the rest of the story through 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, Australia and China, as well as many other markets. Sometimes the same creative, tested in different regions, can yield different perspectives. 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 qualitative research, including focus group studies (both in-person and online), in-depth interviews, online communities and advisory boards, which can round out a comprehensive market intelligence plan.

*By producing online surveys only, other research companies are telling only 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 can only be uncovered by qualitative research—extremely important considerations that averages and assumptions extrapolated from survey statistics are likely to miss.*

## IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

*Unlike many other firms, CMI will never sell or represent another research company's services. Nor will we outsource your projects and report on the results of a third party's work. Without being intimately involved in every aspect of a project—discussing client goals, designing the study, building and implementing the survey, and engaging directly with consumers in focus groups—it is difficult to gain the insights that we regularly deliver. CMI's hands-on LGBT research specialization spanning over two decades is unmatched.*

## VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBT market intelligence, however, and the cumulative 60+ years of LGBT-dedicated experience among the CMI team, we're able to keep your costs low. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 20+ years.

*At CMI, we're not running a large operation juggling many accounts and projects with varied focus. Our client dedication and LGBT market specialization delivers you superior intelligence at a fraction of the cost.*

## WE ARE TRUSTED. WHY THIS IS IMPORTANT:

Community Marketing, Inc., founded in 1992, pioneered LGBT consumer research. Because our company is 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 that ultimately lead to social progress, better conditions for LGBT employees, and more 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 & Insights, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the world's only LGBT-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBT-Owned Business Enterprise.

## AND PROUD OF OUR 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 leading business and advocacy organizations, events and conferences within the community, such as Out & Equal, HRC, National Gay & Lesbian Chamber of Commerce, GLAAD, NCLR and the International Gay & Lesbian Travel Association. Our community connection is not only the right thing to do, it is essential for maintaining authentic community relationships to benefit our clients.