

CMI's Inaugural LGBT China Tourism & Hospitality Study December 2014



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, Europe, Australia and China. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › Key findings have been published in the New York Times, Washington Post, Chicago Tribune, Los Angeles Times, Wall Street Journal, Forbes, USA Today, Miami Herald, CBS News, NPR, Associated Press and many other international, national and regional media.
- › CMI's research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: San Francisco Travel, Visit Philadelphia, Visit Palm Springs, Travel Portland, Greater Fort Lauderdale Convention and Visitors Bureau, NYC & Co., Empire State Development Corp., Visit Baltimore, Tourism Toronto, Japan National Tourism Organization, Japan Air Lines, Prudential, Wells Fargo Bank, Aetna, Target Brands, Johnson & Johnson, WNBA, United States Census Bureau, American Cancer Society, Kaiser Family Foundation and numerous other corporations and organizations across North America and around the world.



RESEARCH DESIGN

OVER 20 YEARS OF LGBT INSIGHTS



Who Did We Target?

- › LGBTs 18 and above residing in China. Respondents were recruited from CMI's proprietary research panel and social media (Weibo, WeChat) accounts.
- › 788 total respondents completed the survey. This report focuses on China data for these self-identified members of the LGBT community.
- › The CMI panel 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 LGBTs interacting with LGBT media and organizations in China.



What Was the Methodology?

- › This 12-minute comprehensive online survey on LGBT travelers was mobile optimized made available through an email invitation to survey panelists, as well as on social media from November 9 – 24, 2014.
- › Respondents were entered into a drawing for one of five RMB100 Dangdang.com digital gift cards in recognition of their time to participate in the study.
- › The report separates results by sexual identity and occupation where applicable.

Summary and Key Findings

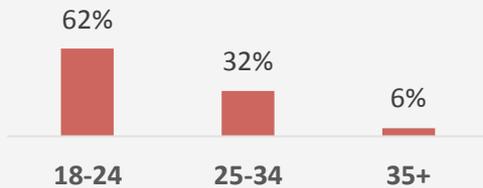
- Survey respondents are young, highly educated and residing in economically advanced cities. The median age is 23, 60% possess a bachelor's degree or greater and 72% of them are living the top 30 affluent mainland Chinese cities with the highest GDP in 2013. They are becoming the hard core LGBT travelers in the years to come.
- While survey respondents do not represent "all" LGBT Chinese, of course, they do represent those who are connected to the LGBT community and can be reached with dedicated communications.
- These Chinese LGBTs' travel increased in all categories in the past year. 82% of respondents took leisure trips in the past year and 25% are frequent travelers, taking more than 5 leisure trips per year. 19% of them took 5 or more round trip flights in the past year and 61% spent 5 or more nights in hotel in the past year.
- Travel behaviors are different among genders. Compared with gay and bisexual men, lesbian and bisexual women are more likely to identify themselves as higher price range travelers (39% vs. 20%), less likely to identify as economy/budget travelers (48% vs. 60%) and more likely to travel overseas and to Hong Kong, Macau and Taiwan (31% vs. 22%).
- Budget hotel (1 and 2 star), mid-ranged hotel (3 star), small B&B, inn or guesthouse and upscale/luxury hotel are the most popular accommodations among Chinese LGBTs. Lesbian and bisexual women are more likely to stay at upscale/luxury hotel (32% vs. 20%) than gay and bisexual men. Value of price for hotel quality, location and low price are the most important motivators for Chinese LGBTs when choosing a hotel.
- Fine dining (63%) is the most important destination influencer followed by history/historic sites (39%), overall cost of trip (39%), climate (32%), and waterfront (e.g., beach) (30%). Gay and bisexual men are more driven by local LGBT life compared to lesbian and bisexual women (33% vs. 23%). Students consider a destination's arts and museum scene as a bigger influencer than young professionals under 30 (28% vs. 13%).

Summary and Key Findings

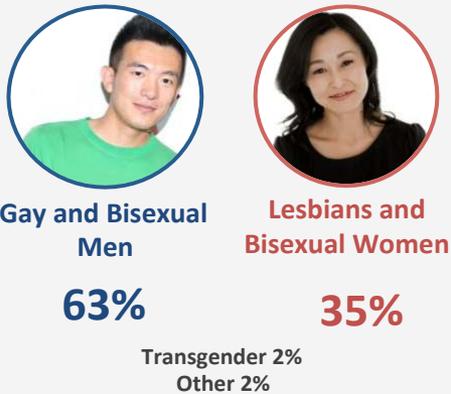
- For domestic travel, 72% of Chinese LGBTs took at least one leisure trip in mainland China. Beijing, Shanghai, Hangzhou and Chengdu are the most popular destinations in mainland China for Chinese LGBTs.
- As for LGBT events travel, 16% of those who traveled within mainland China indicated they attended local LGBT events during their trips. The most popular LGBT events are Pride, LGBT culture/arts/film events, LGBT circuit party/dance events and lesbian community events.
- For international travel and travel to Hong Kong, Macau and Taiwan, 25% of respondents indicated they took at least one leisure trip to these destinations. Lesbian and bisexual women outperform gay and bisexual men by 9% (31% vs. 22%). Among those international travelers, 93% visited Asia, 13% visited Europe, 13% visited America, 5% visited Oceania and 2% visited Africa. When selecting an international destination, they consider safety (87%) flexible visa rules (60%) and laws to protect LGBT people (45%) very important.
- For a dream vacation, LGBT Chinese would like to visit various developed countries around the world and well-known LGBT friendly countries. No countries really outperformed one over another in this consideration.
- Chinese LGBTs are actively using their mobile devices for travel purposes. 92% of lesbian and bisexual women and 85% of gay and bisexual men have used their mobile devices during and/or when planning a trip. Most popular activities are looking at local maps/directions (86%), finding restaurant/dining information (77%), booking hotel/lodging (75%), and researching destination attractions (68%). Lesbian and bisexual women are more likely to review photos or other people's rating about the destination, attraction, hotel, etc. (65% vs. 54%), book flights (54% vs. 44%) and look up flight status (50% vs. 36%) using mobile devices. Gay and bisexual men are more likely to research local the LGBT scene (36% vs. 25%) and date people while on a trip (26% vs. 5%).

Respondent Profile

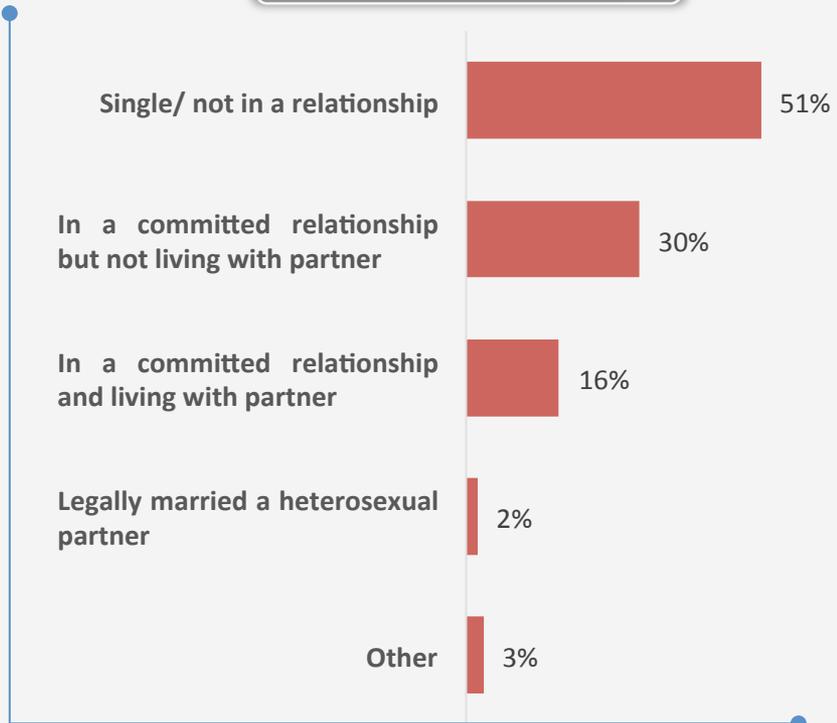
Age



Identity*



Relationship Status**

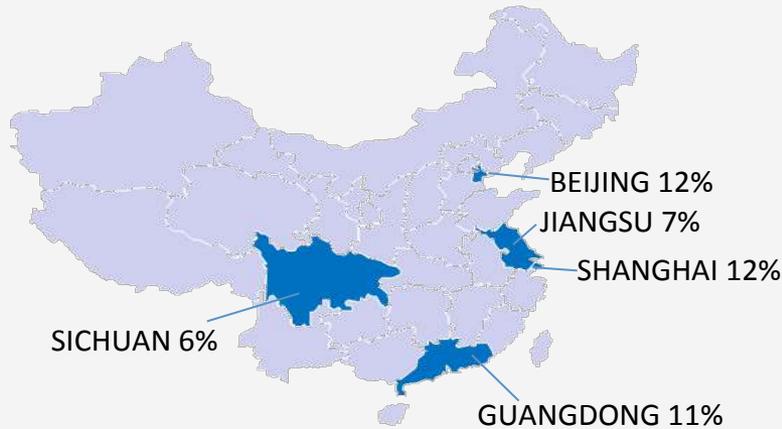


Base: All LGBT n=788

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

Respondent Profile

Top Cities/Provinces Represented



Level of Education

Bachelors Degree	47%
Associates Degree or Professional Certification	24%
Master's Degree or Higher	13%
High School/Secondary School	12%

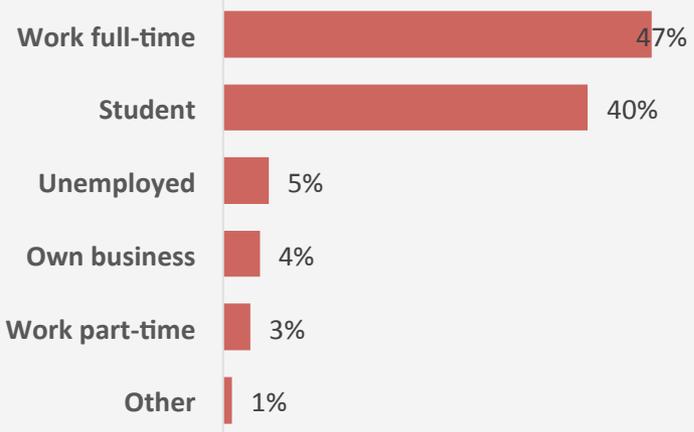
Living Environment

- Tier **1** Cities **39%**
- Tier **2** Cities **32%**
- Tier **3** Cities **24%**

72%

Living in the 30 most affluent cities in China*

Employment Status



Base: All LGBT n=788

* Top 30 affluent cities with the highest GDP in 2013

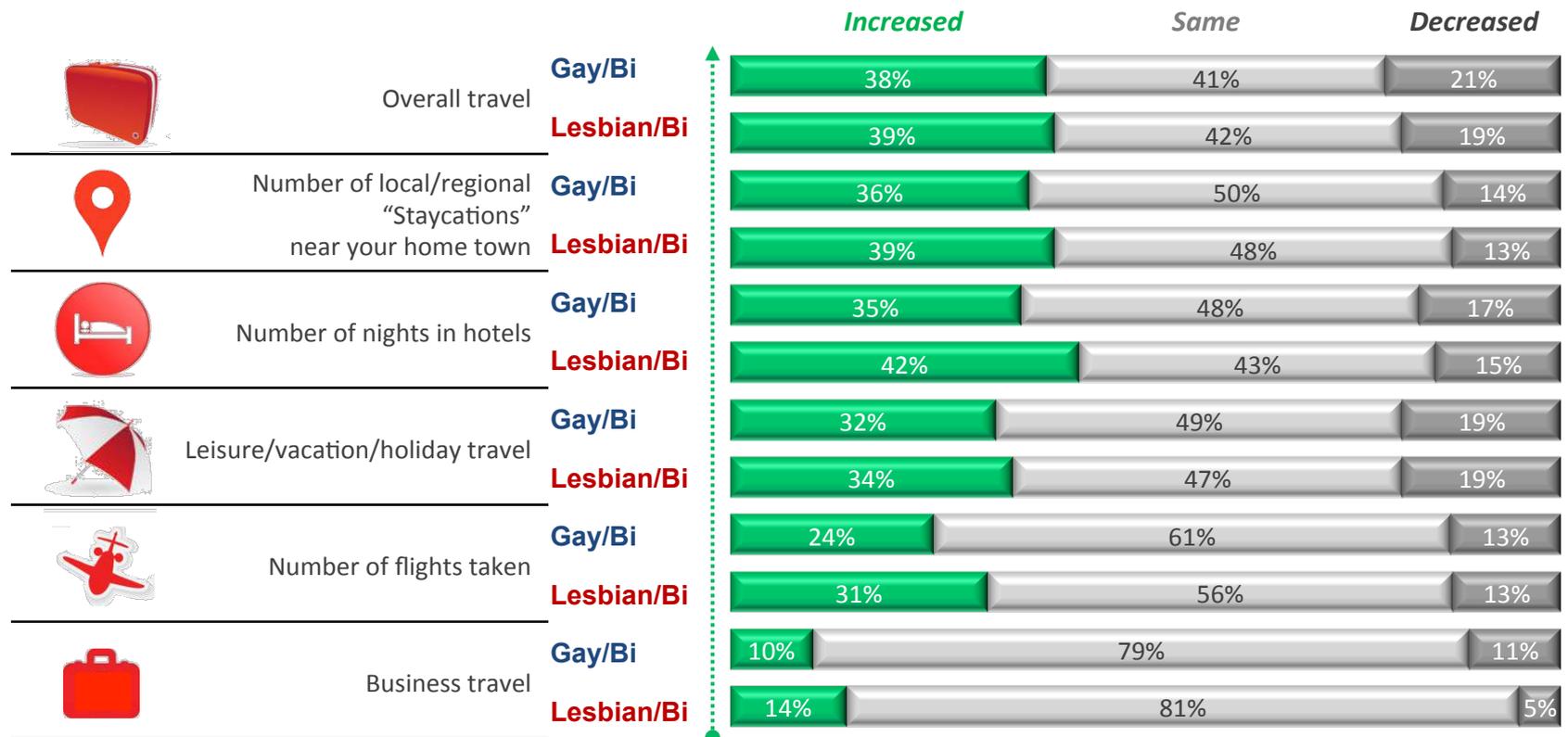


LGBT Travel



LGBT Travel Increasing: Chinese LGBTs' travel in the past year increased in all categories. The increase is in consistency with the trend of the general travel population in China. The increase in lesbian/bisexual women travel is overall a little bit higher than gay and bisexual men.

Comparing your travel during the past 12 months, to your travel in the 12 months before that, did you travel more, about the same, or less over the last year than in the previous year?



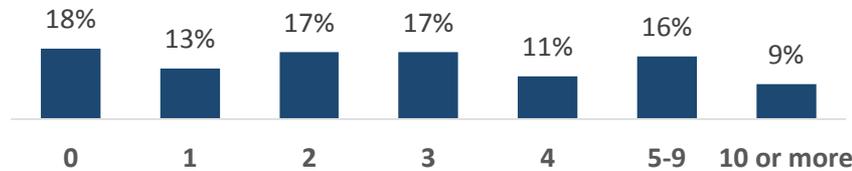
Base: Gay/Bi Men n=482; Lesbian/Bi Women n=265

Frequent Travelers: 82% of respondents took leisure trips in the past year and 25% are frequent travelers, taking more than 5 leisure trips per year. Plus they use air travel and lodging services quite frequently. But only 17% have taken business trips, which is likely do to the respondents' young age and lack of working experience.

Past 12 Months Travel



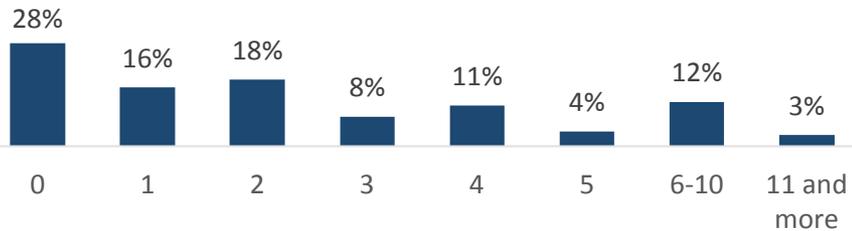
Leisure trips (vacations/holidays)



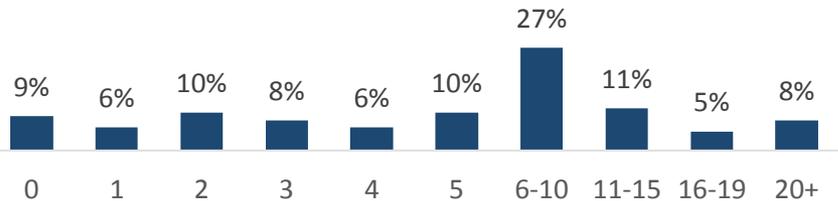
Business trips



Flights Taken



Hotel Nights



Base: All LGBT n=536-780

Travel Price Range: Lesbian and bisexual women in China are more likely to travel than gay and bisexual men. Most LGBT travelers identify as economy / budget travelers. However, lesbian and bisexual women are a lot more likely to pay for pricy products and services during their trips.

Looking back at all your vacation travel over the last few years, what “price range” of traveler are you? (Pick the one that best applies to most of your trips.)



Bases: Gay/Bi Men n=493; Lesbian/Bi Women n=272; Workers under 30 n=321; Students n=313

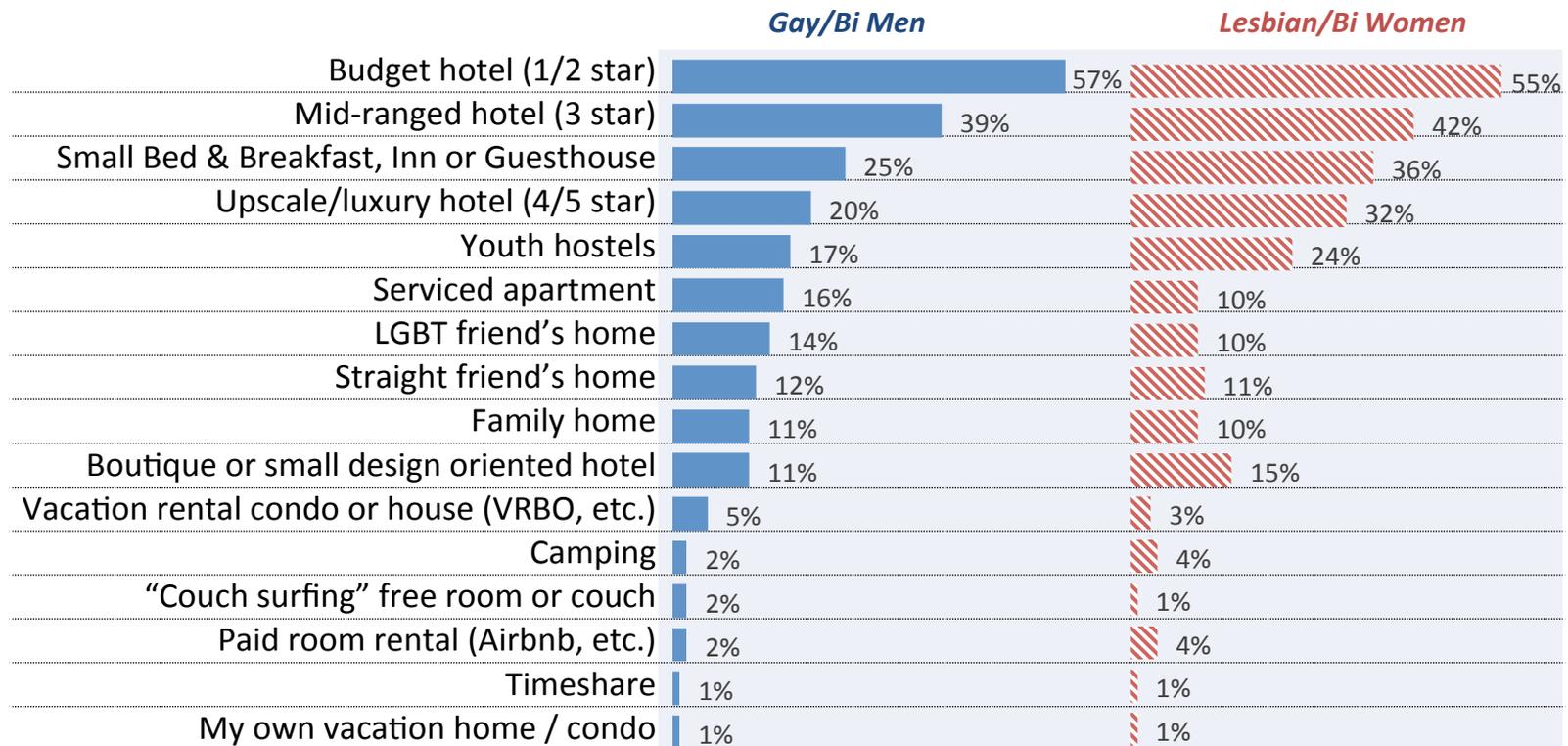


LGBT Accommodations



Types of hotels: Since most Chinese LGBTs identify as economy / budget travelers, it's no surprise that they often stay in budget hotels during their trips. Lesbian and bisexual women are more likely to stay in almost all kinds of accommodations than gay and bisexual men, especially in small B&Bs, inns or guesthouses and upscale/luxury hotels.

In the past 12 months, in which type of accommodations did you stay (mark any that you actually booked)?

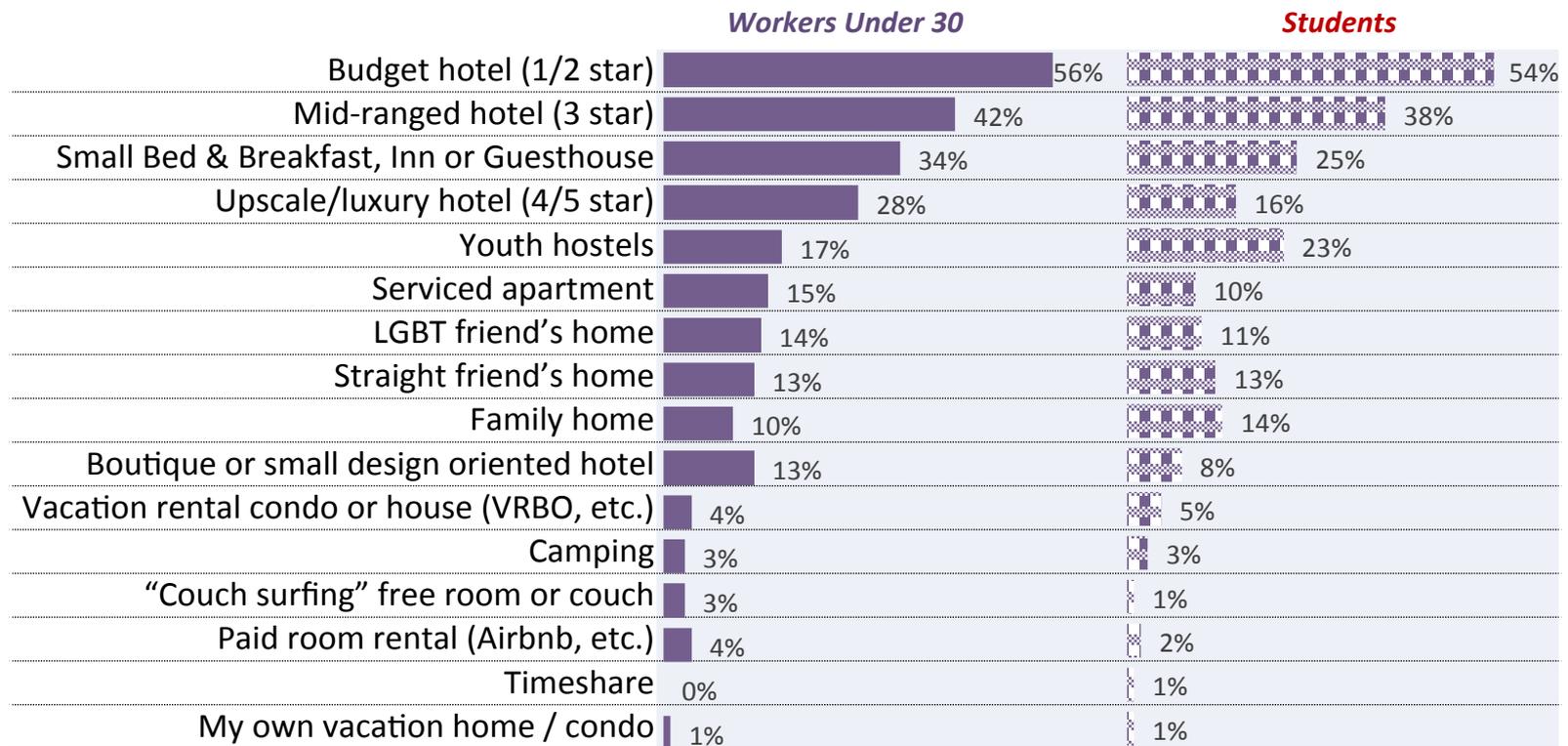


Base: Gay/Bi Men n=489; Lesbian/Bi Women n=271

*LGBT Dedicated or Mainstream

Types of hotels: Young professionals under 30 are more likely to choose luxury hotels and small B&Bs, inns or guesthouses while students are more likely to stay at youth hostels.

In the past 12 months, in which type of accommodations did you stay (mark any that you actually booked)?



Base: Workers under 30 n=323; Students n=314

*LGBT Dedicated or Mainstream

Hotel Selection Rankings: Value of price for hotel quality, location and low price are the most important motivators for Chinese young LGBTs when choosing a hotel. Since there are few hotels marketing to the LGBT community in China, LGBT-friendly reputation doesn't play an important role.

When you shop for hotels, how would you rank the following motivators in your selection process? Drag over your highest motivator first, then 2nd and then continue.

	Gay/Bi Men	Lesbian/Bi	Workers 30-	Students
 Value of price for hotel quality	1.8	1.8	1.8	1.8
 Location	2.1	1.9	1.9	2.1
 Low Price	2.5	2.9	2.8	2.4
 LGBT friendly reputation	3.8	3.7	3.7	3.9
 Hotel loyalty program	4.5	4.8	4.8	4.6
 Luxury reputation of the hotel brand	4.8	4.6	4.6	4.8

Base: Gay/Bi Men n=333; Lesbian/Bi Women n=178; Workers under 30 n=201; Students n=229



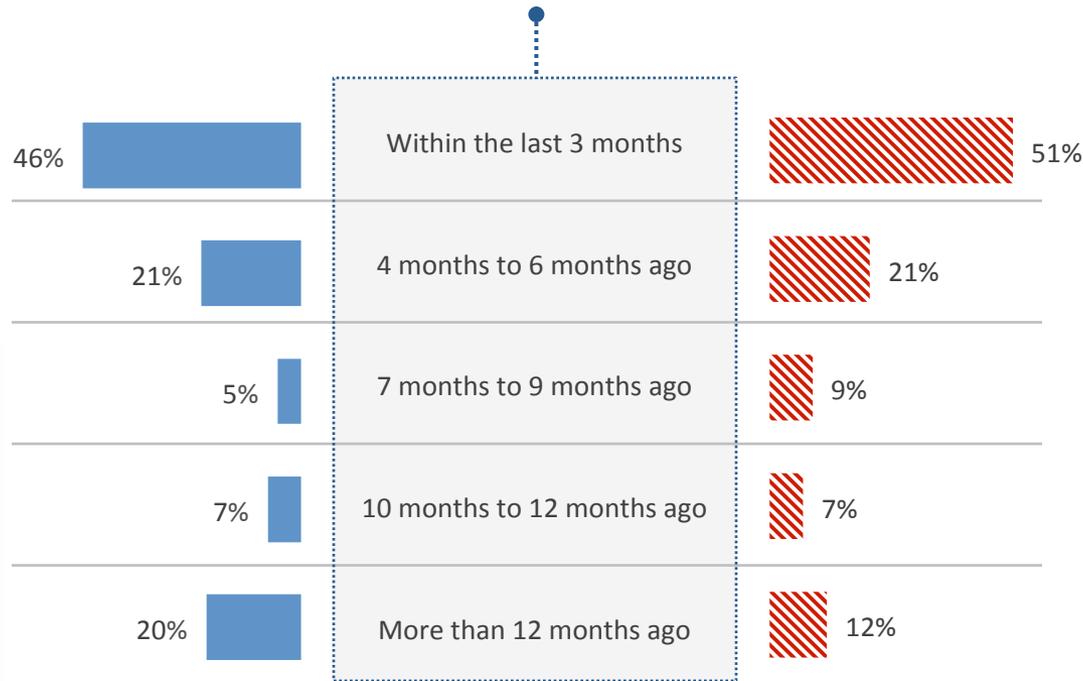
LGBT Destinations



Profile of the Most Recent LGBT Vacation: 82% of Chinese LGBTs reported taking a vacation and spending 2 or more nights in the hotel in the past year.

Think about your most recent vacation where you spent 2 or more nights in a hotel.

How long ago was that vacation?



Among Gay and Bisexual Men



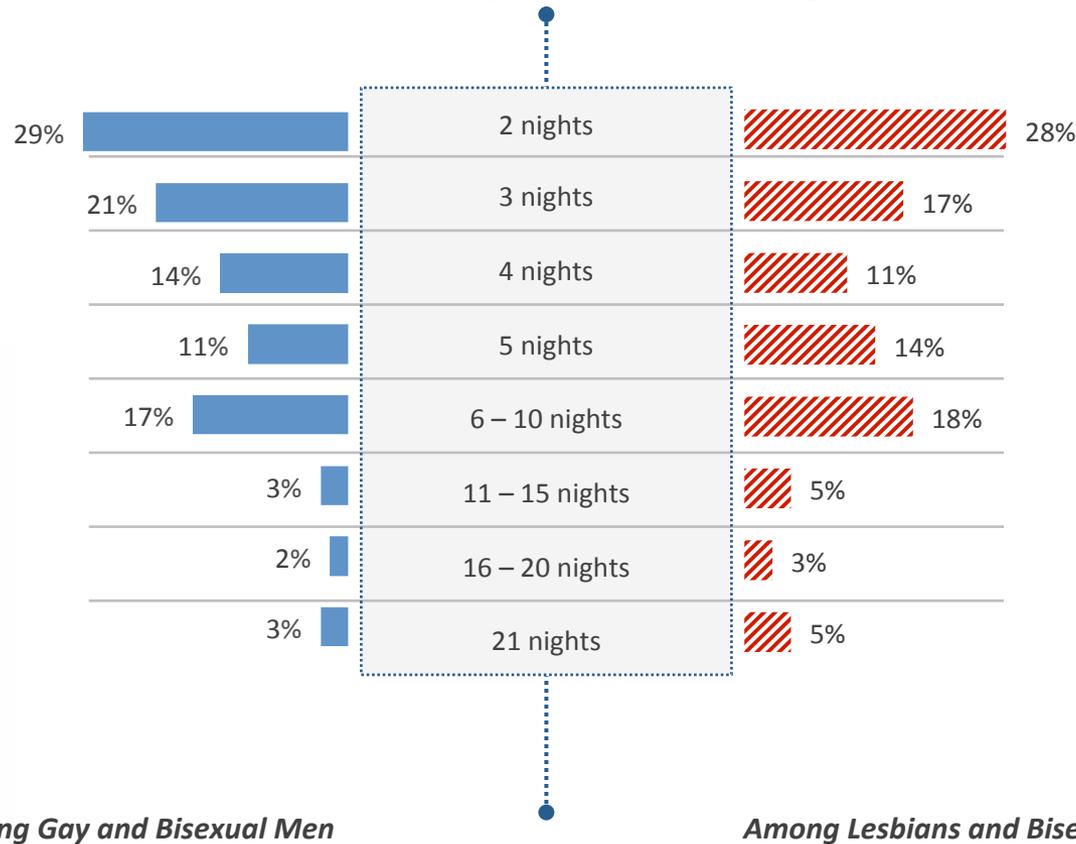
Among Lesbians and Bisexual Women

Base: Gay/Bi Men n=456; Lesbian/Bi Women n=254

Length of Vacation: Of those who traveled in the past 12 months, 52% spent at least 4 nights in a hotel.

Think about your most recent vacation where you spent 2 or more nights in a hotel.

If the vacation was within the last 12 months, what was the length of your vacation?
Please select the approximate number of nights.



Among Gay and Bisexual Men

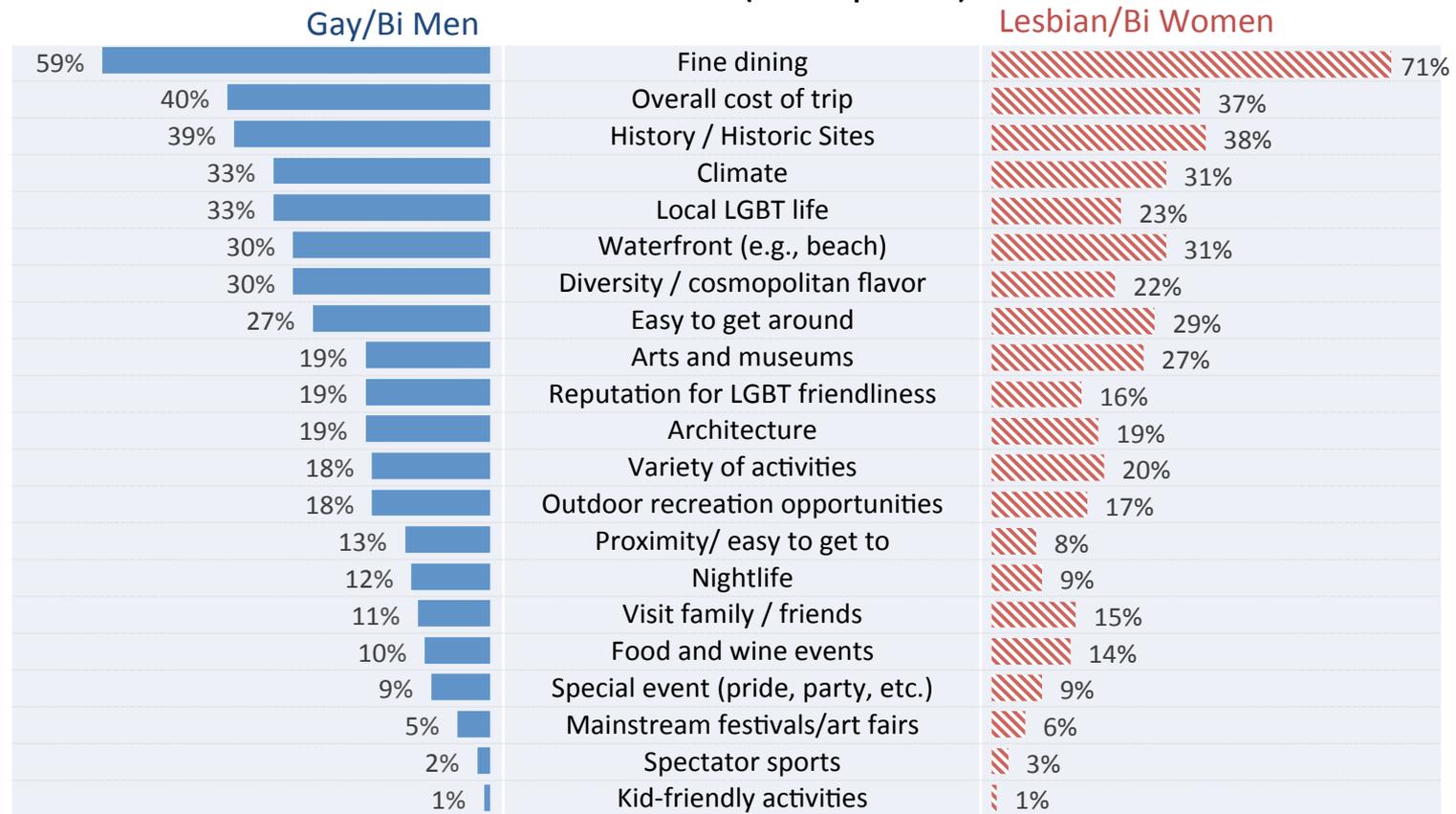


Among Lesbians and Bisexual Women

Base: Gay/Bi Men n=308; Lesbian/Bi Women n=182

Destination Influencers: Chinese LGBTs are gourmets. Fine dining, overall cost of trip and history/historic sites are most important for Chinese LGBTs when considering a destination.

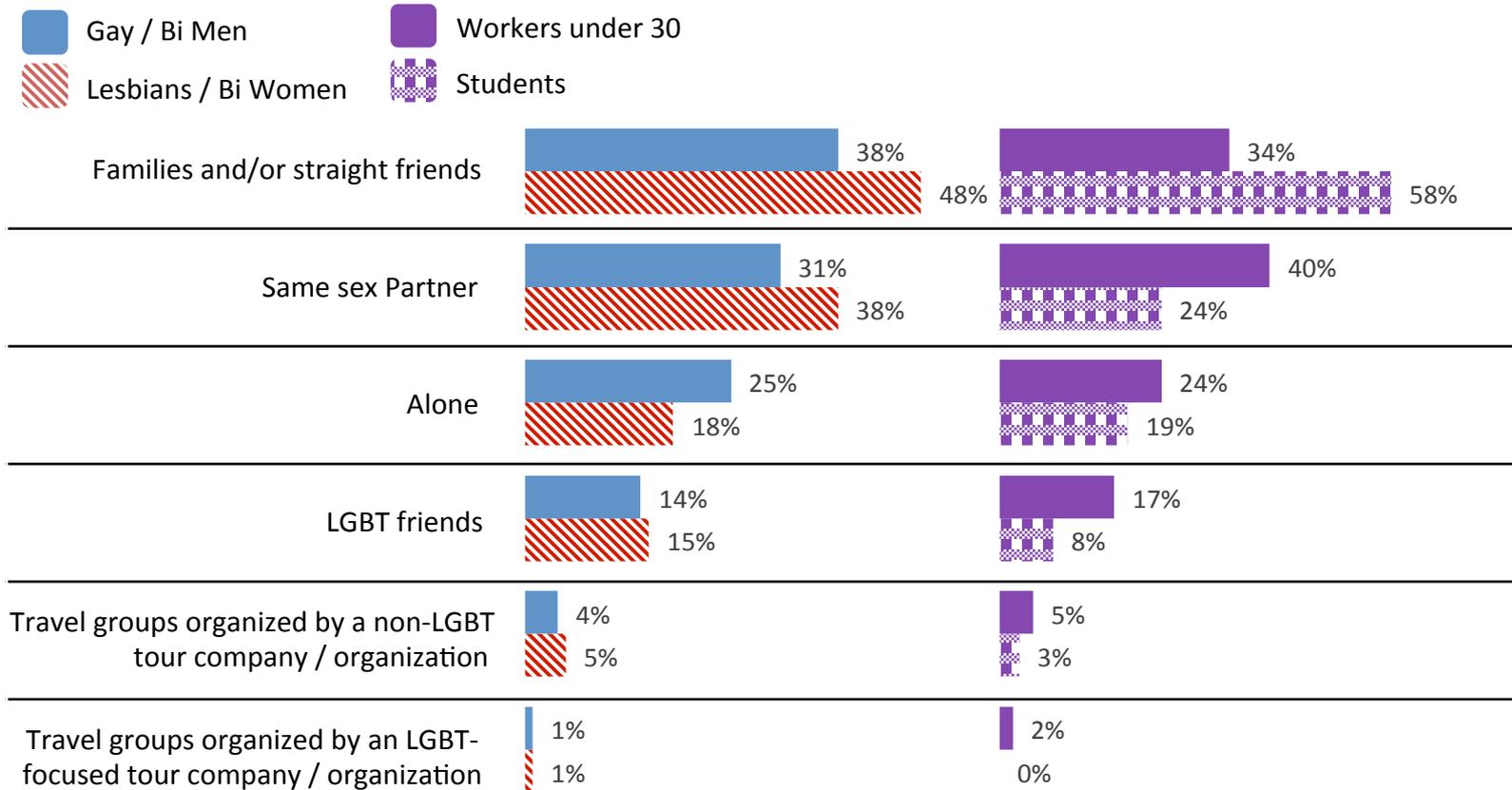
Which of the following criteria that you consider important when selecting a leisure travel destination? (Select up to five)



Base: Gay/Bi Men n=493; Lesbian/Bi Women n=272

Travel Companies: Lesbians and bisexual women travel with a variety of parties while gay and bisexual men are more likely to travel alone. Young professionals are more likely to travel with LGBT cohort but students travel with families and/or straight friends more.

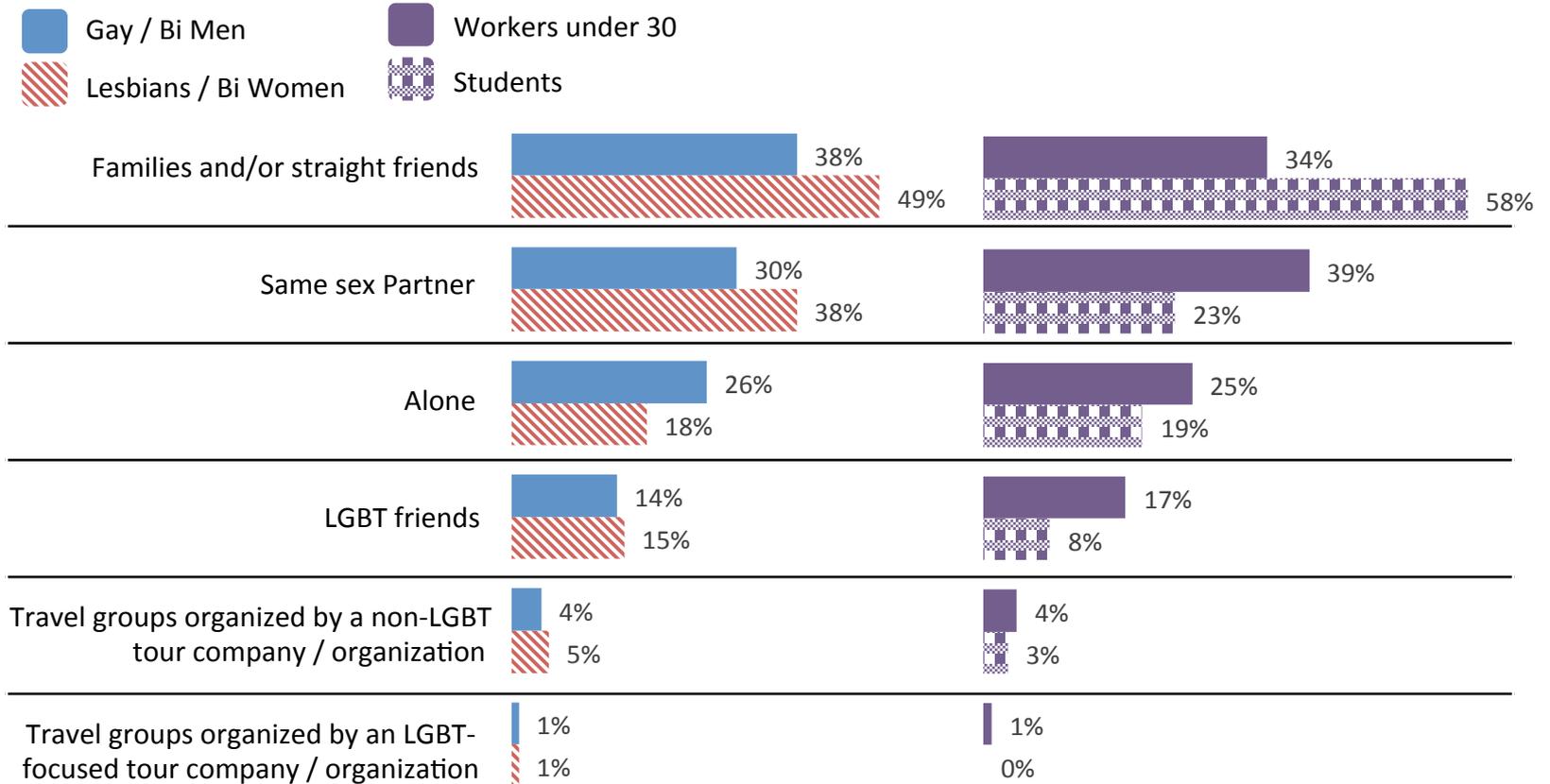
**Think back to your last VACATION of two nights or more, where you stayed in a hotel.
If the vacation was within the last 12 months, With whom did you travel with?**



Base: Gay/Bi Men n=308; Lesbian/Bi Women n=182; Workers under 30 n=192; Students n=208

Travel Companies: Lesbians and bisexual women travel with a variety of parties while gay and bisexual men are more likely to travel alone. Young professionals are more likely to travel with LGBT cohort but students travel with families and/or straight friends more.

**Think back to your last VACATION of two nights or more, where you stayed in a hotel.
If the vacation was within the last 12 months, With whom did you travel with?**



Base: Gay/Bi Men n=348; Lesbian/Bi Women n=200; Workers under 30 n=218; Students n=224

Domestic Vacation: Travel is becoming a cultural necessity for young Chinese LGBTs. More than 72% of respondents reported that they have traveled in mainland China in the past 12 months.

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



Lesbians / Bi

Yes!

74%



Students

Yes!

72%



Gay / Bi Men

Yes!

72%



Workers Under 30

Yes!

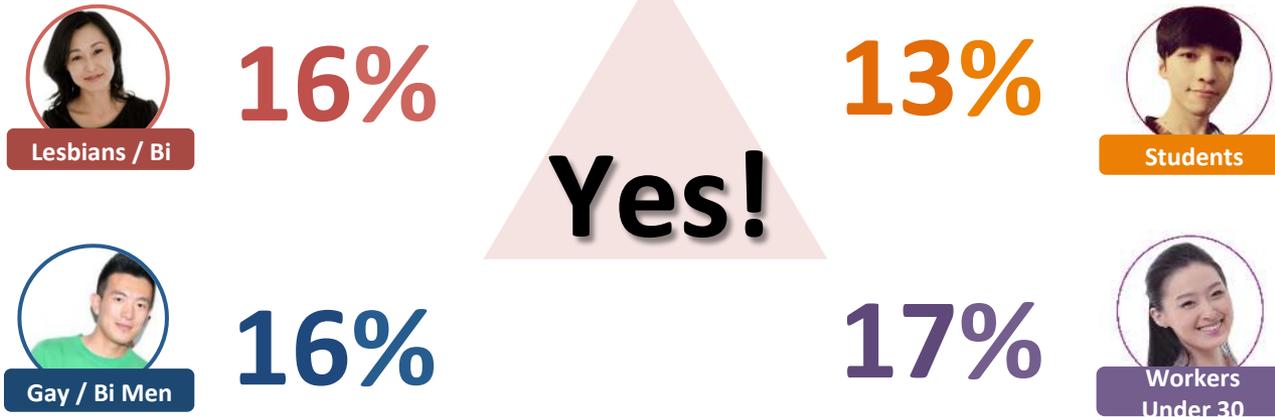
73%

中国旅游

Base: Gay/Bi Men n=496; Lesbian/Bi Women n=272; Workers under 30 n=323; Students n=314

Domestic LGBT Events Travel: 16% of LGBT Chinese traveled to another city in China to attend LGBT community events. The most popular events are LGBT Pride , LGBT cultural, arts or film events, LGBT circuit party/ dance events and lesbian community events.

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



Popular Events

LGBT Pride event

LGBT cultural, arts or film event

LGBT circuit party / dance event

Lesbian community event

Base: Gay/Bi Men n=353; Lesbian/Bi Women n=197; Workers under 30 n=230; Students n=223

Domestic Destination Ranking: Beijing, Shanghai, Hangzhou and Chengdu are the most popular destinations in mainland China for Chinese LGBTs.

You said you've taken at least on leisure trip or vacation in China (staying overnight in a hotel), please tell us where you've been to exactly? If you are living in one of the following cities, please skip that city. (Please mark all that apply)

	Gay Bi Men	Lesbian Bi Women	Workers Under 30	Students
Beijing	33%	24%	29%	31%
Shanghai	28%	27%	31%	25%
Hangzhou	22%	27%	27%	17%
Chengdu	19%	20%	19%	18%
Nanjing	19%	16%	20%	17%
Suzhou	18%	18%	24%	12%
Xi'an	17%	11%	17%	11%
Tianjin	15%	9%	15%	11%
Guangzhou	14%	21%	16%	15%
Xiamen	13%	20%	18%	11%
Shenzhen	13%	15%	17%	11%
Qingdao	12%	13%	16%	11%
Chongqing	11%	14%	14%	8%
Wuhan	10%	7%	10%	8%
Sanya	10%	11%	13%	6%
Lijiang	9%	12%	13%	7%
Changsha	8%	6%	7%	8%
Dalian	8%	5%	8%	7%
Kunming	8%	9%	9%	5%
Guilin	6%	8%	7%	5%

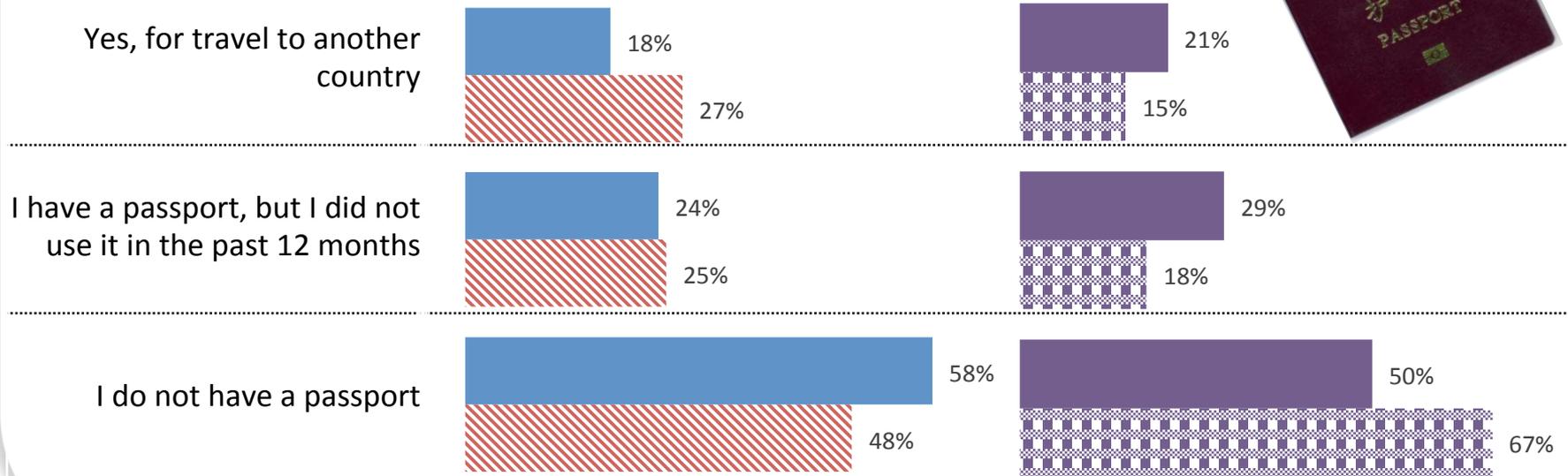
Base: Gay/Bi Men n=352; Lesbian/Bi Women n=199; Workers under 30 n=232; Students n=224

Passport Use: 46% of Chinese young LGBTs possess a passport. Among the passport holders, 47% having been actively using it for outbound travel (except Hong Kong, Macau and Taiwan).

Did you use your passport in the last 12 months?

Gay / Bi Men
Lesbians / Bi Women

Workers under 30
Students



Base: Gay/Bi Men n=496; Lesbian/Bi Women n=272; Workers under 30 n=323; Students n=314

International Vacations: 25% of young Chinese LGBTs surveyed have taken at least one trip outside mainland China in the past year. Lesbian and bisexual women out performed their male counterparts in several travel categories, so it's not surprised that they surpass gay and bisexual men by 9% in outbound travel.

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



Lesbians / Bi

Yes!

31%



Students

Yes!

17%



Gay / Bi Men

Yes!

22%



Workers Under 30

Yes!

25%

Welcome ようこそ Bienvenue ยินดีต้อนรับ Willkommen 환영합니다

Base: Gay/Bi Men n=496; Lesbian/Bi Women n=272; Workers under 30 n=323; Students n=314

International Destination Ranking: For leisure trips to international destinations including Hong Kong, Macau and Taiwan in the past year, 93% of the respondents surveyed visited Asian destinations. European and North American destinations obtained an equal popularity of 13%. 5% visited Oceanian destinations and 2% visited Africa.

You said you've taken at least on leisure trip or vacation in a foreign country or Hong Kong, Macao, and Taiwan (staying overnight in a hotel), please tell us where you've been to exactly? (Please mark all that apply)

93% have been to at least one **Asian** destination

13% have been to at least one **European** destination

13% have been to at least one **American** destination

5% have been to at least one **Oceanian** destination

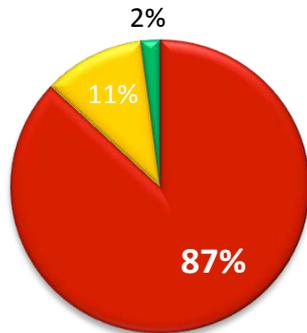
2% have been to at least one **African** destination

Base: Those who have traveled outside mainland China in the past year n=198

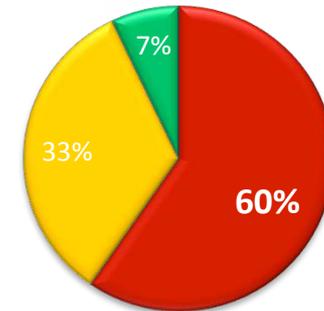
International Destination Influencer: Safety is the top priority for Chinese LGBTs when choosing an international leisure travel destination. In addition to interest in destinations with a low crime rate, they also are concerned about their safety as foreigners and LGBTs. Laws to protect LGBT people and Marriage Equality are also important even though neither of them exists in China.

How important are the following factors when choosing an international leisure travel destination?

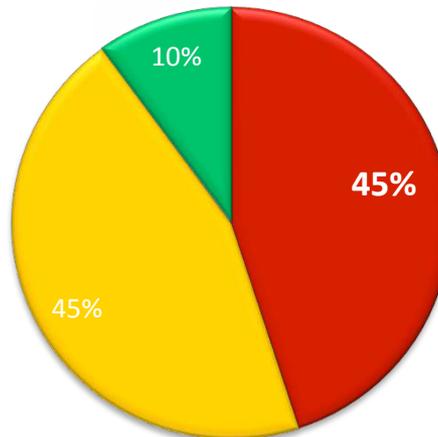
1. Safety (e.g. local crime rate)



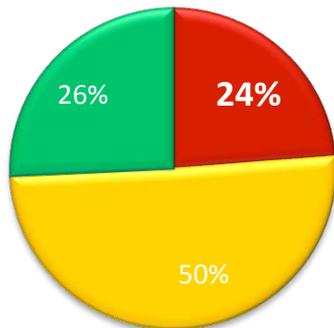
2. Flexible visa rules



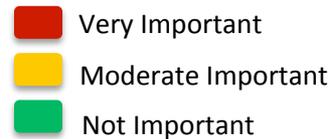
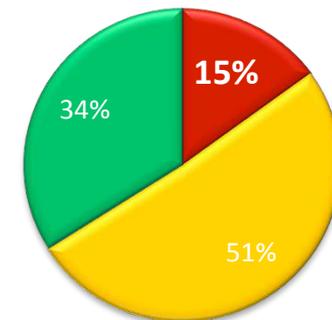
3. Laws to protect LGBT people



4. Marriage Equality



5. Distance and time difference



Base: All LGBT n=194-197

Dream Vacation: Most Chinese LGBTs would like to visit developed countries in Europe and North America where same-sex marriage is legal. Australia and New Zealand score higher among gay and bisexual men. Japan and Thailand score high considering the proximity, and especially Thailand's longtime LGBT friendly reputation.

If cost and time were not issues, what is the one country in the world you would like to visit, that you have never visited before?

Gay / Bisexual Men			Lesbian / Bisexual Women		
12%	USA			UK	12%
9%	UK			France	12%
9%	Netherlands			Japan	9%
8%	Thailand			USA	7%
8%	Japan			Netherlands	5%
7%	France			Thailand	5%
5%	New Zealand			Switzerland	5%
5%	Australia			Iceland	5%

Base: Gay/Bi Men n=359; Lesbian/Bi Women n=164

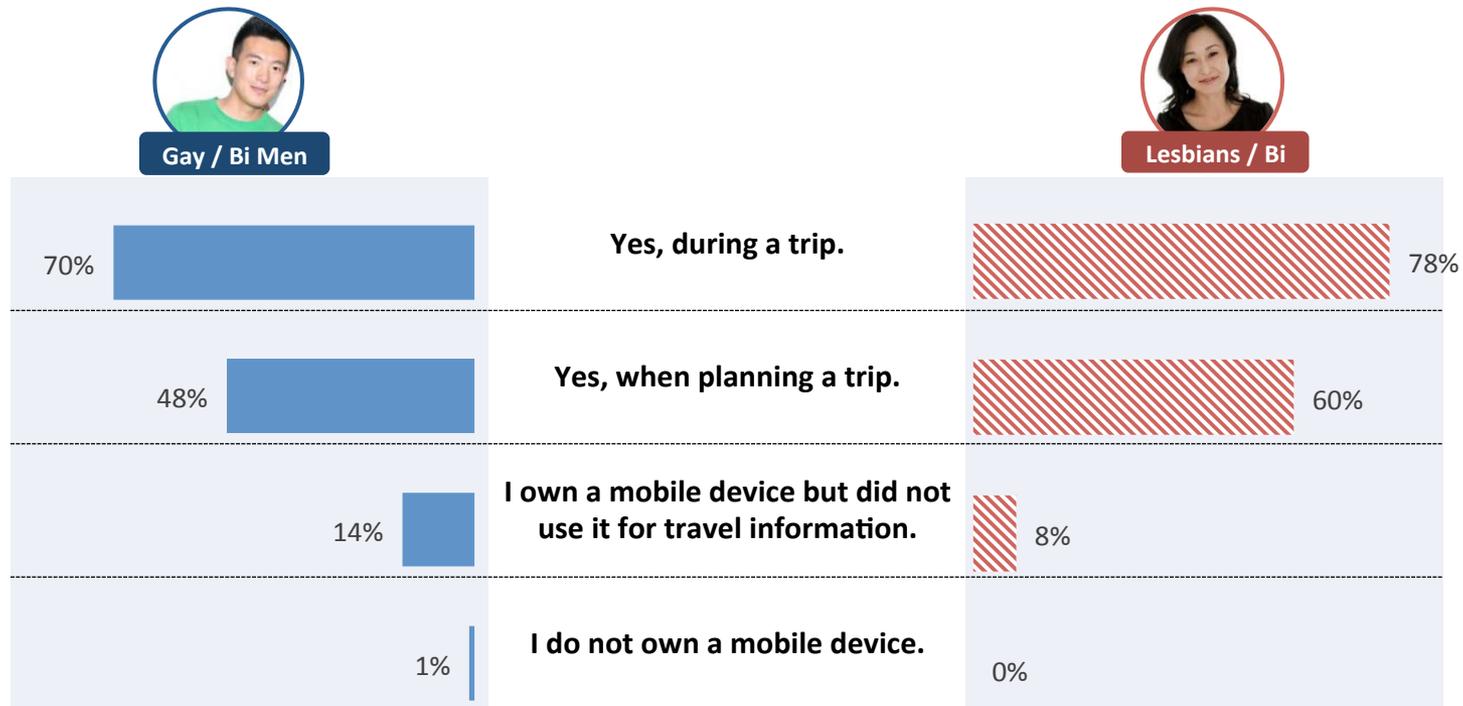


LGBT Mobile Marketing



Use of Mobile Devices: Chinese LGBTs are extremely mobile obsessed and they are making full use of these devices for travel information. 85% of gay and bisexual men and 92% of lesbian and bisexual women have used their mobile devices when planning and/or during a trip.

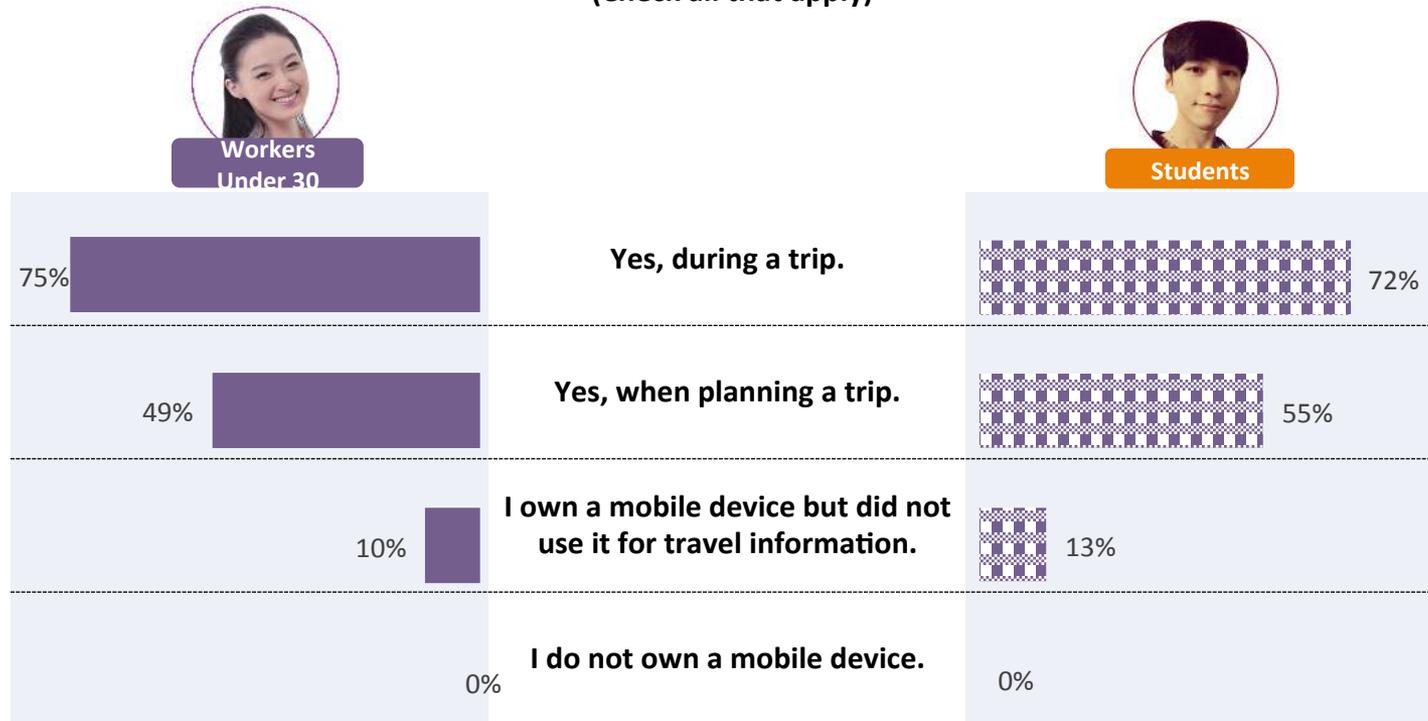
**In the past 12 months did you use a mobile device for travel information?
(Check all that apply)**



Base: Gay/Bi Men n=496; Lesbian/Bi Women n=272

Use of Mobile Devices: Students are a little bit more likely than young professionals to use a mobile device when planning a trip.

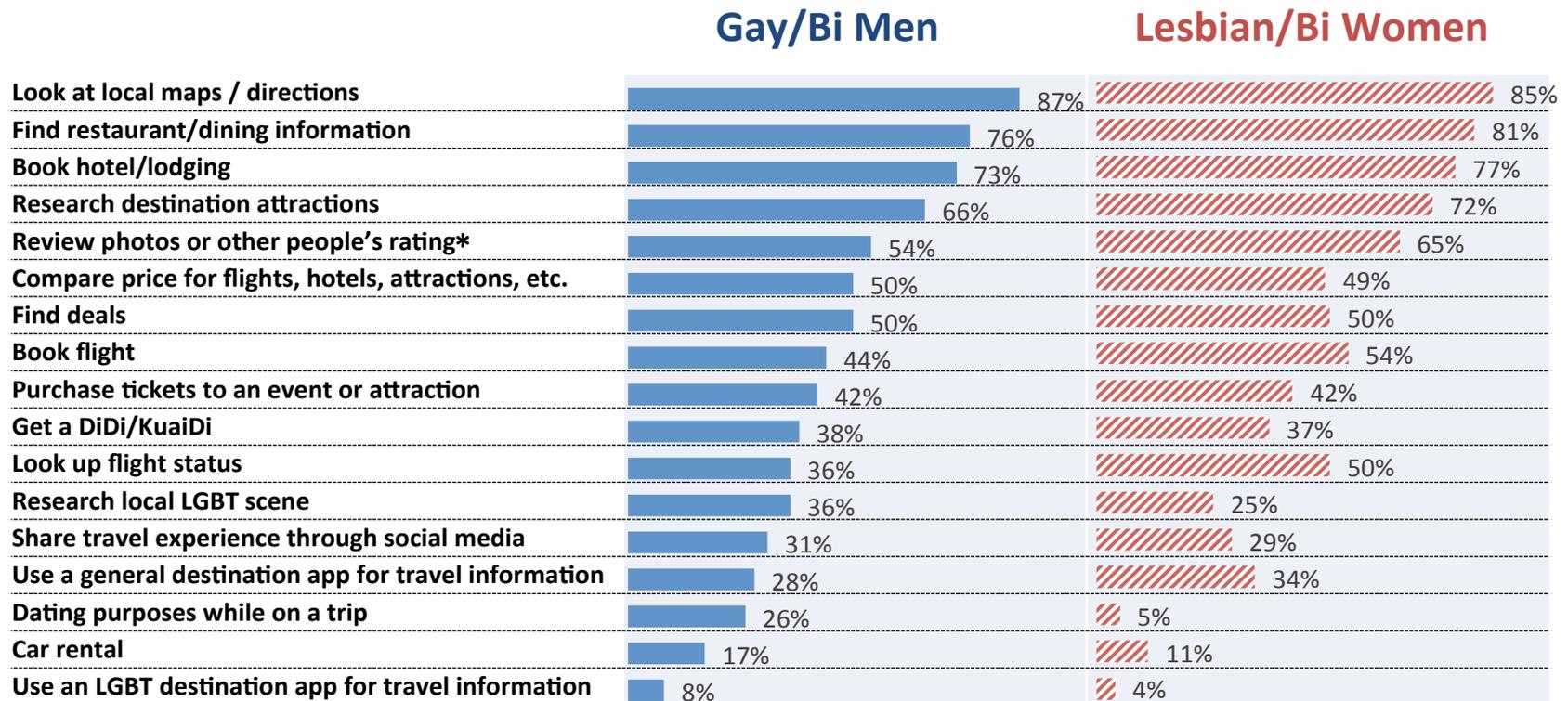
**In the past 12 months did you use a mobile device for travel information?
(Check all that apply)**



Base: Workers under 30 n=323; Students n=314

Mobile Activities: Chinese LGBTs use mobile devices for various travel purposes. Lesbian and bisexual women are more likely to review photos or other people's rating about the destination, attraction, hotels, etc. than gay and bi men. Gay and bisexual men are more likely than lesbian and bisexual women to use their mobile devices to research the local LGBT scene and date while on a trip.

What did you do using your mobile device?
(Check all that apply)

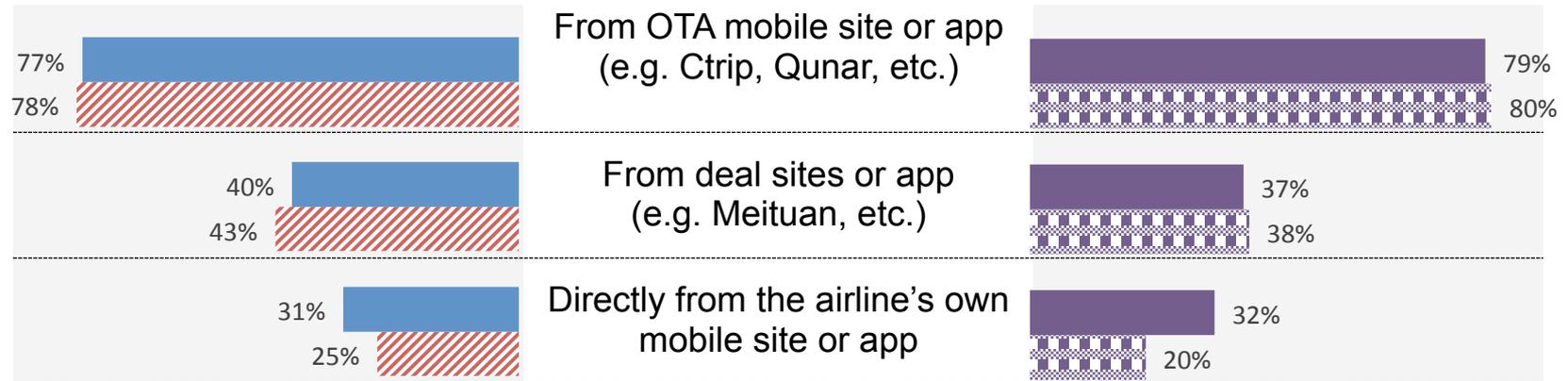


* Review photos or other people's rating about the destination, attraction, hotel, etc.

Base: Gay/Bi Men n=424; Lesbian/Bi Women n=250

Flight Booking by Mobile Device: Most LGBTs book flights through OTA mobile sites or apps, which is in line with the Chinese general public. Young LGBT professionals are more likely to book directly from airline's own mobile site or app, compared to students.

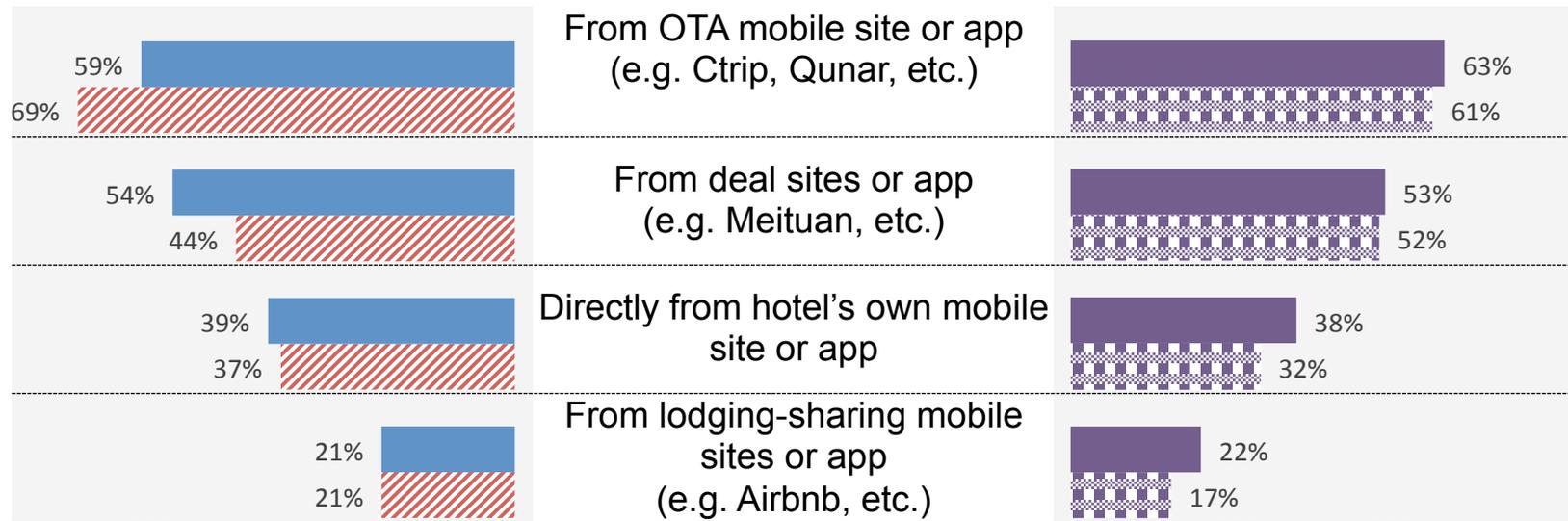
Where did you book your flights using your mobile device?



Base: Gay/Bi Men n=186; Lesbian/Bi Women n=134; Workers under 30 n=145; Students n=102

Hotel Booking by Mobile Device: Again, OTA and deal sites are popular among all cohorts. But lesbians and bisexual women are more likely to use OTAs while gay and bisexual men use more deal sites.

Where did you book your hotel/lodging using your mobile device?



Base: Gay/Bi Men n=309; Lesbian/Bi Women n=193; Workers under 30 n=226; Students n=192

Use of Travel App: Chinese LGBTs are using general market travel apps, especially OTA apps when planning, booking or during a trip.

**Which travel apps do you use regularly, when planning, booking or during a trip?
(write up to 3)**

App Name	Percentage	Year Founded	Category
Qunar 去哪儿	46%	2005	OTA
Ctrip 携程	44%	1999	OTA
Baidu Map 百度地图	24%	2005	Map Services
Meituan 美团	21%	2010	Deal Site
Dianping 大众点评	12%	2003	Review Site
Elong 艺龙	12%	1999	OTA
TongCheng 同程	8%	2004	OTA
Baidu 百度	7%	2000	Search Engine
Alitrip 去啊!	7%	2010	OTA
Gaode Map 高德地图	6%	2001	Map Services

Base: All LGBT n=433

For more information:

CMI's highly specialized services are based on 20+ years of dedicated experience, producing LGBT (lesbian, gay, bisexual, transgender) market intelligence for leading corporate clients and organizations across the country and around the world.

Serving a variety of industries, we leverage our in-house proprietary panel of more than 70,000 community-representative LGBT consumers to produce consumer survey studies, recruit and facilitate focus groups, interviews, etc.

Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBT research/sales/marketing/best practices corporate training and conference presentations.

Diversity procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT Owned Business Enterprise.



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

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The LGBT community is dynamic and diverse, reflecting the spectrum of the general population: From young to old, ethnicities, gender identities, relationship status, income, etc. Narrow marketing strategies viewed LGBT as one community, one market. However, with the sophistication of LGBT consumer research today, market leaders can identify the “segments” of the LGBT community best matched to their products and services. With our representative panel of over 70,000 LGBTs who actively engage with LGBT media, events and organizations, Community Marketing & Insights can identify and deliver the best-matched panel for your research initiative and marketing goals.

Community Marketing, Inc. (CMI) is an NGLCC-Certified LGBT-Owned Business Enterprise. We’ve been helping a wide variety of industry leaders master the subtleties of this market **since 1992**. Our unique and specialized services are based on 20+ years of experience and industry leading case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), strategic consulting and corporate training.

Whether your organization is just learning about the market, or is updating its strategy, **Community Marketing & Insights** can accelerate your plans, reduce your risks and deliver *measurable* results. CMI’s proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing & Insights has earned its position as the global leader in LGBT market research and development. Through the company’s tireless efforts, “doors have opened” around the world for the spectrum of LGBT consumers. We have helped grow LGBT market recognition through research, media relations and education; and have brought opportunities to many of the world’s leading marketers.

Community Marketing & Insights projects include these and many other market leaders:

- ABSOLUT Vodka (Pernod Ricard)
- Aetna Insurance
- American Cancer Society
- Chicago History Museum
- Credit Suisse
- E. & J. Gallo Winery
- Esurance (an Allstate Company)
- Gilead Pharmaceuticals
- Hawaiian Airlines
- Hyatt Hotels & Resorts
- Japan National Tourism Organization
- Kaiser Family Foundation
- Kimpton Hotels & Restaurants
- Las Vegas CVA
- Merz Radiesse
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- OraSure Technologies
- Prudential Financial
- Tourism Office of Spain
- Target Brands
- U.S. Government: Census Bureau and HUD (Housing & Urban Development)
- Wells Fargo Bank

And many more...

CMI'S LGBT

CONSUMER RESEARCH PANEL 2014-15

DID YOU KNOW...?

The LGBT community is dynamic and diverse, reflecting the spectrum of the general population: From young to old, ethnicities, gender identities, relationship status, income, etc. Narrow marketing strategies viewed LGBT as one community, one market. However, with the sophistication of LGBT consumer research today, market leaders can identify the "segments" of the LGBT community best matched to their products and services. With our representative panel of over 70,000 LGBTs who actively engage with LGBT media, events and organizations, Community Marketing & Insights can identify and deliver the best-matched panel for your research initiative and marketing goals.

CMI'S LGBT CONSUMER PANEL: WHAT MAKES IT UNIQUE?

- **Accurate, targeted market intelligence**

Utilizing quantitative and qualitative market research methodologies, Community Marketing & Insights helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

- **The largest, most representative panel**

With over 20 years in business, Community Marketing & Insights has developed a research panel of more than 70,000 LGBT consumers. We've partnered with media outlets and LGBT-oriented organizations and events throughout the country and around the world to recruit a qualified panel that is geographically representative of the LGBT population.

- **Candid responses, honest feedback**

As an LGBT-owned and -operated firm, we've established trust with our panelists. We speak their language and know how to communicate effectively with them. As a result, our panelists are willing to talk with us frankly and frequently, even about sensitive issues.

- **Community Marketing & Insights experience & expertise**

Since 1992, Community Marketing & Insights has provided market research, corporate training and marketing planning services to a wide variety of clients. We've provided LGBT consumer intelligence to numerous market leaders including Wells Fargo Bank, Target Brands, Prudential, Johnson & Johnson, Aetna, ABSOLUT Vodka, MillerCoors Brewing Co., Japan National Tourism Organization, Tourism Office of Spain, E&J Gallo Wineries, OraSure Technologies, Chicago History Museum, Tourism Toronto, MetLife, Hyatt Hotels & Resorts, and many other companies, as well as the American Cancer Society, Kaiser Family Foundation, IFAW, UPenn, CUNY, and the U.S. Government (Census Bureau and H.U.D.).

We also present public and custom onsite educational seminars and workshops. Community Marketing & Insights has produced or presented at LGBT marketing symposia on six continents.

Learn more on our website, www.communitymarketinginc.com



SAMPLE DEMOGRAPHICS OF USA LGBT PANELISTS

48 MEDIAN AGE

41% SINGLE/NOT IN A RELATIONSHIP
19% LEGALLY MARRIED
5% CIVIL UNION OR REGISTERED DOMESTIC PARTNER

65% COLLEGE GRADUATES INCL. BACHELORS+
75% ARE EMPLOYED
57% HHI >\$50K

5% PURCHASED A HOME IN THE PAST 12 MONTHS
8% PLAN TO PURCHASE A HOME IN THE NEXT 12 MONTHS
39% PURCHASED A MAJOR VACATION (5 NIGHTS+) IN THE PAST 12 MONTHS
46% PLAN TO PURCHASE A MAJOR VACATION (5 NIGHTS+) IN THE NEXT 12 MONTHS

44% DRINK WINE WEEKLY
42% DRINK BEER WEEKLY
49% DRINK SPIRITS OR COCKTAILS WEEKLY

PAST 12 MO. PURCHASES
17% AUTOMOBILE
15% FURNITURE
60% PERFORMING ARTS TICKETS
10% MAJOR KITCHEN APPLIANCES (\$500+)
24% LGBT FUNDRAISING GALA TICKETS

52% "LIKED" A BUSINESS ON FACEBOOK
61% READ LGBT BLOGS / WEBSITES
31% CLICKED ON A FACEBOOK AD
42% CLICKED ON A MOBILE APP AD
22% USE LGBT MOBILE APPS

66% CARE FOR PETS

SHARED OR RETWEETED A COMMERCIAL AD OR ANNOUNCEMENT 14%
TWEETED DURING A TELEVISION SHOW USING A RECOMMENDED #HASHTAG 9%
TUNED INTO A TELEVISION SHOW AFTER SEEING RELATED TWEETS 9%
USED SOCIAL MEDIA TO VOICE A POSITIVE EXPERIENCE WITH A BRAND OR PRODUCT 34%
USED SOCIAL MEDIA TO VOICE A NEGATIVE EXPERIENCE WITH A BRAND OR PRODUCT 24%

AND MORE!

LGBT Market Research:

There is a difference!

Market research studies and resulting statistics are meant to help marketers understand the LGBT communities, and influence educated decisions about their strategies and tactics. However, *not all research is the same*. **Community Marketing & Insights** methodologies and experience are distinct from those of others when considering approaches, respondent panels—and ultimately—the validity and utility of sought-after results.

WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has developed our proprietary consumer panel over the past 20+ years by circulating field surveys at leading LGBT events, and by partnering with LGBT organizations and media across the USA, Canada, the UK, and around the world. These partners distribute our survey invitations via print ads, web banners, email broadcasts and social networks to their memberships and/or readers. The resulting panels are highly representative of LGBT consumers who interact with the LGBT community and media. *This is important:* If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations. CMI research is trusted by—and frequently quoted in—the *New York Times*, *USA Today*, the *Wall Street Journal*, *Forbes*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *Ad Week*, NPR, CBS News, Associated Press, etc.

Other providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate that they are gay or lesbian in the context of a survey. This approach, attempting to “represent the gay community at large,” may be appropriate for direction in sociological or academic studies, but not for developing clear, representative advertising or marketing related strategies. Other researchers use lists from one or two LGBT publishers, which may skew results. For marketers desiring valid LGBT consumer insights about products, services, advertising creative and marketing strategies, these panel development approaches are not likely to yield LGBT community members who are interacting with the media where you are placing ads.

IN RESEARCH, SIZE DOES MATTER.

CMI has conducted over a hundred LGBT-dedicated research studies since the early '90s, covering a wide variety of topics, industries and interests. Through our work, we both observe and influence the trends of this market. Size does matter in the case of research. Our research panel has grown to over 70,000 qualified LGBT consumers, the largest of its kind, by far. Our 6th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 148 countries, making it the largest such study in history. We leverage our long history / experience / expertise for your benefit, and fine-tune our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of the panel, or “reinvent the wheel” at your expense. One cannot fathom the diversity and complexities within LGBT (see below) on a small sample. And with small samples, you lose the opportunity to derive statistically-significant cross tabs on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a 28 year old lesbian in Seattle has the same purchasing motivations and behaviors as a 67 year old gay man in Atlanta? Generalities and sweeping statements about “the gay market” based on comparatively small samples can distort the results of research findings, potentially wasting your investment of time and resources.

DIVERSITY: THERE IS NO “LGBT MARKET”

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

General surveys on “the gay market” are likely to only scratch the surface of the diversity and varieties of opportunities marketers can enjoy if properly explored and understood.

continues...

TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE

Since 1994, CMI has taken pride in operating the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. *Quantitative* (data) research is one important side of a coin, but only tells half of the story. The other side of a comprehensive research initiative involves *qualitative* research, most notably derived from focus groups. We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany and Australia, as well as many secondary markets. We've found that the same creative, tested in different regions, often yields substantially differing results. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns? CMI is the *only* LGBT-dedicated research provider that produces and facilitates LGBT focus group studies and other *qualitative* research options. We have developed and reported on focus groups covering a wide variety of topics, plus we have operated telephone interviews, field surveys, advisory board series and multi-year customer satisfaction survey projects which can round out a comprehensive market intelligence plan.

Producing only online surveys, other research companies are telling half of the story (at best). Without actual consumer interaction, they cannot fathom the deeper insights hiding behind the bar graphs and pie charts, nor can they adequately advise you on the sensitivities and complexities that are only uncovered in qualitative research... extremely important considerations that averages and extrapolated assumptions based only on survey statistics are likely to miss.

WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We do all of our research in-house, because nobody knows this market segment as well as we do. We never sell or rep another company's services, nor will we outsource your project to a 3rd party.

Some firms work as reps of research companies, or outsource clients' projects, and report on the results of the 3rd party's work. But without being intimately involved in every aspect of the project, from discussing the client's goals and designing the study, to building the survey, implementing it and writing the report, and without engaging directly with consumers in focus groups, it is difficult to gain the insights that can only come from CMI's hands-on LGBT research specialization spanning nearly two decades.

TRUSTED

Community Marketing, Inc., founded in 1992, pioneered LGBT consumer research. Because we are LGBT-owned and -operated and well known in the community, we have earned the recognition and trust of our survey panelists. LGBT consumers recognize that we use research data to build corporate relationships, which ultimately lead to better conditions for LGBT employees, social progress, and sensitive communications.

PROUDLY LGBT-OWNED AND -OPERATED

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBT-owned suppliers when sourcing products and services. When you contract with Community Marketing, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the only LGBT-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBT-Owned Business Enterprise.

COMMUNITY CITIZENSHIP

CMI is involved in the LGBT community: We volunteer time, donate resources and raise funds for numerous community-based organizations. We also participate in the community's leading business and advocacy organizations, events and conferences, such as Out & Equal, HRC, National Gay & Lesbian Chamber of Commerce, GLAAD, NCLR, International Gay & Lesbian Travel Association, National Lesbian & Gay Journalists Association, etc. This community connection is not only the right thing to do, it is essential for initiating appropriate relationships for our clients.

VALUE

You'd think that with this kind of specialization and experience, you'd be investing considerably more for **Community Marketing & Insights** services than for research from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 60+ years of dedicated LGBT research among the CMI team, that we can actually keep your costs low. We are not spending your money to locate qualified survey or focus group participants, nor are we spending our time (or your money) trying to source comparative data or case studies. We've done all that over the past 20 years for your benefit. And we are not running a large operation that juggles many accounts and projects of differing scope and focus. CMI's client dedication and market specialization delivers you superior intelligence at a fraction of the cost of other firms.