



Same-sex Weddings in 2016: A Review of CMI Research One Year After the Landmark Rulings by the United States Supreme Court

Community Marketing & Insights (CMI)
in partnership with
WeddingWire, Inc., GayWeddings and
the Gay Wedding Institute.



RESEARCH PARTNERS

The **Community Marketing & Insights** team has been conducting LGBT consumer research for 25 years. Our practice includes online surveys, focus groups (on-site and virtual), IDIs, MROCs, 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.

The **Gay Wedding Institute** is the world's first LGBTQ wedding training academy. Bernadette Smith is founder and one of the nation's leading LGBTQ wedding experts. Since 2010, Bernadette and her team have trained thousands of wedding and hospitality professionals from 20 countries on the nuances of LGBTQ weddings towards a vision of an inclusive industry where all couples feel safe and supported.

GayWeddings is the leading site dedicated to providing wedding inspiration, wedding planning resources, networking and support to engaged couples, their loved ones and wedding professionals since 1999. Powered by WeddingWire and led by publisher Kathryn Hamm, one of the nation's leading LGBTQ wedding experts, GayWeddings offers one the largest and most comprehensive directories of approximately 150,000 LGBTQ-friendly wedding professionals.

WeddingWire, Inc. is the leading global online marketplace connecting consumers with event and creative professionals. Across WeddingWire's mobile and web platforms, consumers are able to read over 2.5 million vendor reviews and search, compare and book from a database of over 400,000 businesses; businesses are provided with technology resources to serve their clients through advertising, marketing and other management tools. Founded in 2007, the WeddingWire portfolio of sites serves couples and businesses across 15 countries in North America, Latin America, Europe and Asia, making it the worldwide leader in weddings.

Studies Referenced in this Research Review

2016 Survey of Contemporary Couples & Wedding Trends • May 2016

- Conducted by Community Marketing & Insights (CMI) in partnership with WeddingWire, Inc., GayWeddings and the Gay Wedding Institute.
- Online survey of over 1,400 participants. The summary in this report focuses on the 356 United States same-sex couples (212 female and 144 male) and 584 opposite-sex couples married on and after 6/26/2015 or currently engaged. Additional data is available on the CMI and WeddingWire websites.
- Research participants were recruited from the databases of all four partner organizations.

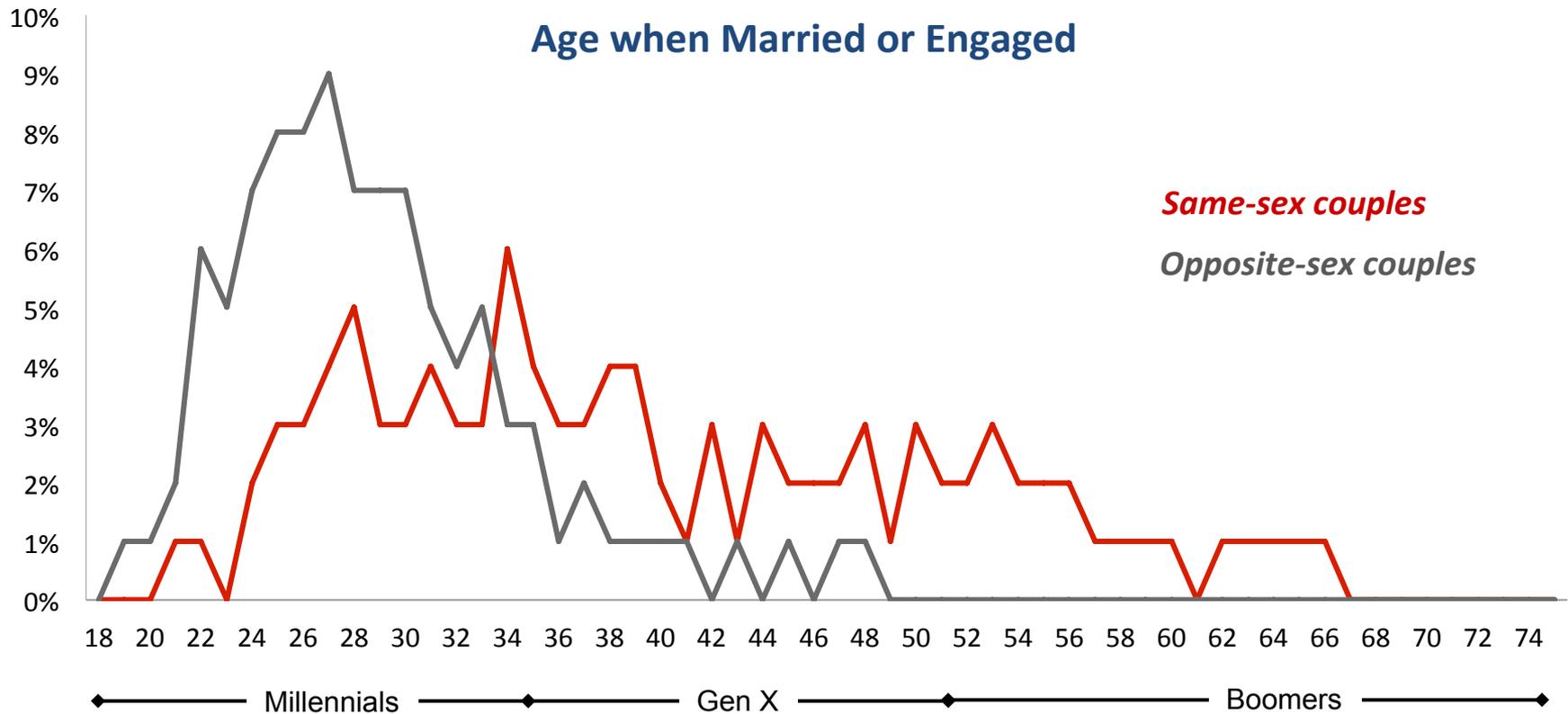
CMI's 20th Annual Survey on LGBT Tourism & Hospitality • December 2015

- Conducted by Community Marketing & Insights.
- Online survey of 3,772 self-identified members of the LGBT community in the United States.
- Research participants were recruited from the Community Marketing & Insights' LGBT Research panel.

CMI's 10th Annual LGBT Community Survey® • April-May 2016

- Conducted by Community Marketing & Insights.
- Online survey of over 20,000 self-identified members of the LGBT community in the United States. This summary consists of an analysis of 649 same-sex couples that married in the past year.
- Research participants were recruited from 200+ LGBT print and digital media, organizations and events.

Age when Married/Engaged: Opposite-sex couples were more likely to be younger when getting married/engaged, typically in their early 20's to early 30's. In contrast, same-sex couples were more evenly spread across ages, most likely in their mid 20's to early 50's. This is because many same-sex couples were partnered for many years before marriage equality, or had their first marriage opportunity later in life. The age difference is important in understanding the rest of the results in this report. As time passes from the 2015 United States Supreme Court ruling, the observed age difference should adjust to be similar in the future. However, in the short term it is important for wedding planners and vendors to understand this age difference.



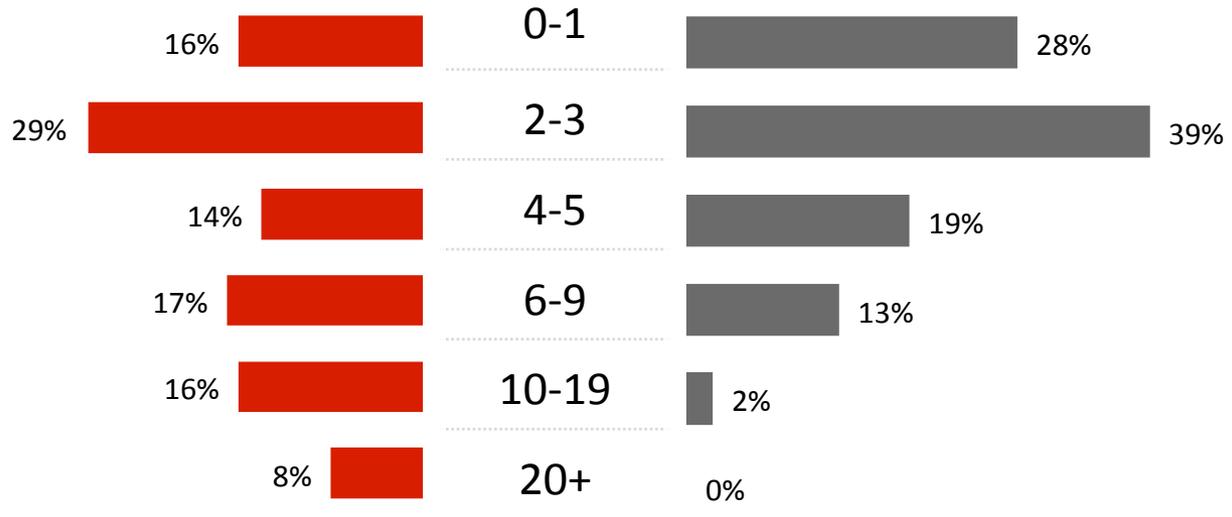
Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

Years Together before Marriage/Engagement: In general, same-sex couples have been together longer than opposite-sex couples before their marriage. This may have nothing to do with “careful planning,” but simply because marriage was not available to these couples in the past. With marriage equality now established, this percentage should become more similar in the future. However, in the short term it is important for wedding planners and vendors to understand this difference. The perspectives of a couple together for 10+ years may be different than the needs of a couple together three years or less.

How many years were you with your partner (dating, living together, etc.) before your engagement?

Among Same-sex Couples

Among Opposite-sex Couples



Base: Married/Engaged Same-sex Couples n=348; Married/Engaged Opposite-sex Couples n=579

States and Expanding Marriage Equality: In the past, same-sex couples often needed to travel to other states to get married. This became an economic boom for states such as New York and Massachusetts that were early to establish marriage equality. Since the U. S. Supreme Court ruling in 2015, the percentage of same-sex couples marrying or planning to marry in their own state is now similar to opposite-sex couples.

Where did you get married / plan to get married?

Among Same-sex Couples



Among Opposite-sex Couples



Base: Married/Engaged Same-sex Couples n=354; Married/Engaged Opposite-sex Couples n=583

Engagement and Gender Roles: Traditional gender roles influence how couples propose and exchange engagement rings. For opposite-sex couples, the concept of the man proposing and presenting an engagement ring to the woman is strong. Among same-sex couples, both proposal and engagement ring exchange is more equal. 42% of same-sex couples exchanged two engagement rings, compared to only 4% of opposite sex couples. However, 23% of same-sex couples did not exchange any engagement rings vs. only 3% of opposite sex couples. Averaging the figures below, same-sex and opposite-sex couples purchase about the same number of engagement rings, but the patterns are very different.

**Tell us about your proposal.
(Please check one.)**

<i>Same-sex Couples</i>		<i>Opposite-sex Couples</i>
27%	I proposed to my partner only	6%
26%	My partner proposed to me only	84%
15%	We took turns proposing to each other	1%
14%	We had a conversation and decided jointly to get married.	4%
16%	We talked about it over time and jointly made a plan together.	4%
1%	Other	1%

Did you purchase / exchange one or more engagement rings?

<i>Same-sex Couples</i>		<i>Opposite-sex Couples</i>
23%	No engagement rings	3%
22%	One engagement ring	91%
42%	Two engagement rings	4%
10%	Used commitment ring(s) we already had	1%
3%	Used jewelry/something other than ring to symbolize engagement	1%

Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

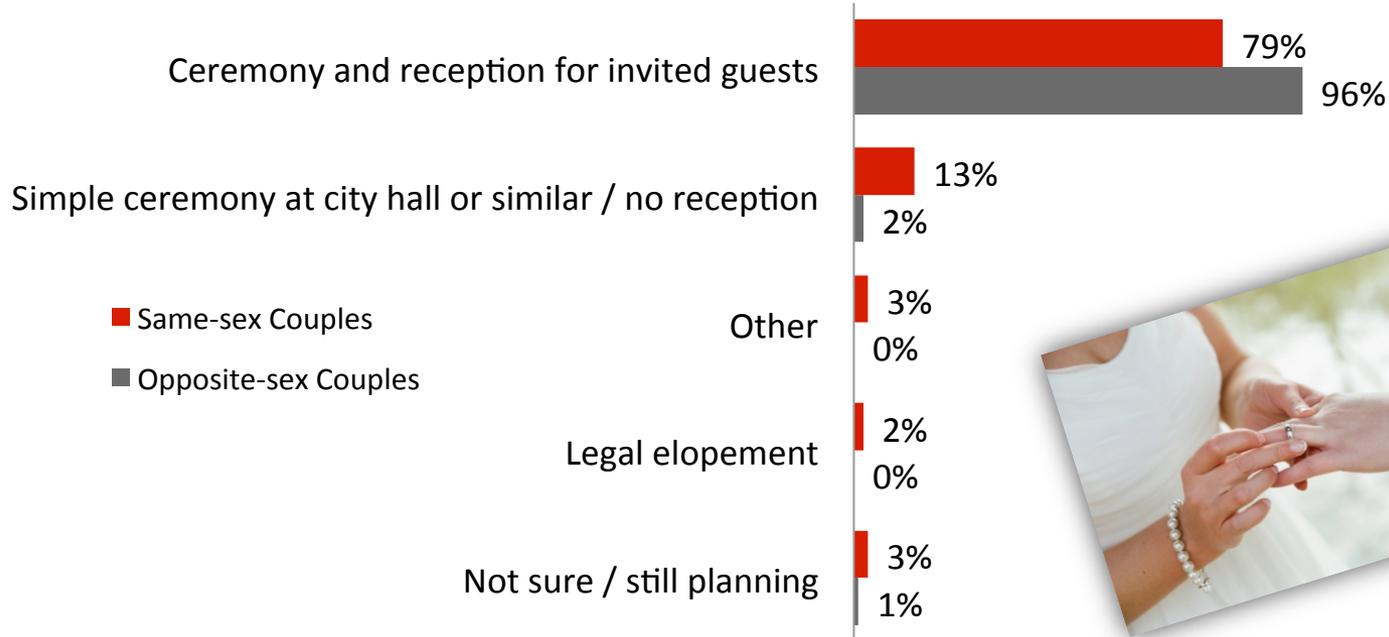
Observations about Type of Ceremony and Number of Guests

- The number of same-sex couples celebrating their unions with a more “traditional” wedding pattern of ceremony and reception with invited guests has increased from 43% prior to 2013, to 79% at the time of this study. This is in contrast to the past when same-sex couples had a much higher percentage of “City Hall Weddings,” often days to weeks after it became legal in their state. Marriage equality is leveling out some of these differences, as more same-sex couples are having larger ceremonies with greater economic impact in their communities.
- Same-sex couples tend to spend less overall on their weddings compared to opposite-sex couples, primarily because they invite fewer guests. For those who had invited guests to a reception, same-sex weddings had an average of 94 guests, while opposite-sex weddings had an average of 150 guests. CMI believes the reason for fewer guests may be because same-sex couples tend to no longer live in the region in which they grew up, so there may be less pressure to invite extended family. Additionally, marrying same-sex couples tend to be older and more likely to be paying for the wedding themselves, which may be an added incentive to keep the number of guests lower.
- Same-sex couples spend slightly more per guest when compared to opposite-sex couples, \$117 per guest vs. \$100 per guest. However, this may also be a function of scale as same-sex weddings tend to be smaller, and perhaps this drives up the cost per guest. Regardless, the difference is not substantive. For a wedding professional, only the budget of the couple before you really matters.
- Of interest, same-sex and opposite-sex couples who plan ceremonies and receptions on websites like WeddingWire and GayWeddings are more likely to be planning larger events, and report spending up to \$29,000 on the wedding. With this group, there was not any difference in total budget between opposite-sex and same-sex weddings.

Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

Ceremony/Reception Patterns: While opposite-sex couples are still more likely than same-sex couples to have a wedding pattern of ceremony then reception for invited guests, this percentage difference has vastly narrowed since our 2013 report. CMI expects these differences to more equalize over time, as same-sex couples enter a stage where their wedding ceremony date is less dictated by court rulings and more guided by their individual planning needs.

Please mark what best describes your planned ceremony and/or reception. We recognize that ceremonies can vary greatly, so please mark what comes closest.



Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

Number of Guests: When calculating number of guests, many same-sex weddings trend smaller; few are over 150 guests, while a much higher percentage of opposite-sex weddings are over 150 guests. There are many factors that drive smaller same-sex weddings. Perhaps the most important is the large number of couples that got married relatively quickly after the Supreme Court ruling, and did not plan larger ceremonies. Also, many same-sex couples are older, have been together for many years and do not live in the communities in which they were born. All of this leads to smaller weddings. In the future, CMI expects that the guest count gap between same-sex and opposite-sex couples will become smaller.

How many guests did you invite / do you plan to invite to the wedding ceremony and reception? We recognize these may be different numbers.



<i>Same-sex Couples</i>			<i>Opposite-sex Couples</i>	
<i>Ceremony</i>	<i>Reception</i>		<i>Ceremony</i>	<i>Reception</i>
7%	8%	0	1%	1%
12%	7%	1-10	2%	1%
9%	8%	11-24	2%	1%
13%	13%	25-49	6%	5%
11%	11%	50-74	8%	8%
11%	12%	75-99	13%	12%
22%	22%	100-149	27%	28%
8%	10%	150-199	20%	21%
4%	5%	200+	21%	22%

Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

Wedding Rings: Like opposite-sex couples, most same-sex couples purchase two wedding rings. Also, note that many same-sex couples were already wearing commitment rings before their “legal” marriage, so a new ring may not have been necessary.

Did / Will you purchase / exchange one or more wedding rings?

Among Same-sex Couples

Among Opposite-sex Couples



70%



No wedding rings	1%
One wedding ring	15%
Two wedding rings	82%
Use commitment ring(s) we already had	1%
Use jewelry/something other than ring to symbolize marriage	0%
Not sure / still planning	2%



Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

The Wedding Ceremony: There are differences in where same-sex and opposite-sex couples hold their wedding ceremonies. Most notably is a drop in same-sex couples' use of religious spaces. Presumably this is because many religious institutions are not supportive of same-sex marriage. However, it should also be pointed out that most opposite-sex couples also do not use religious spaces. The key point is that wedding ceremonies are held in many different types of settings today as desired by the couple.

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

Among Married after 6/26/2015 or Engaged after 6/1/2013



Opposite-sex Couples	Same-sex Couples	
7%	15%	Public park or beach
6%	13%	Private residence
15%	11%	Function space where food and beverages are provided
14%	11%	Function space where you bring your own caterer
3%	10%	City hall or civic space
9%	10%	Historic home or building
25%	9%	Religious space
6%	8%	Hotel
3%	4%	Restaurant
8%	4%	Private club
2%	2%	Museum
16%	10%	Other, please specify:
5%	11%	Not sure / still planning

Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

The Reception: Similarly, receptions are held in many different types of settings for both same-sex and opposite-sex couples. Of note on this chart is that opposite-sex couples are much more likely to use function spaces, while same-sex couples have higher use of restaurants and private residences. This is most likely due to same-sex weddings being smaller in size, which provides additional venue options. Also, LGBT couples, especially older ones, may care more about holding the reception someplace personally significant, and the reception size allows the space to be an option.

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

Among Married after 6/26/2015 or Engaged after 6/1/2013



	Same-sex Couples	Opposite-sex Couples
Public park or beach	6%	4%
Private residence	12%	8%
Function space where food and beverages are provided	13%	27%
Function space where you bring your own caterer	15%	20%
City hall or civic space	1%	2%
Historic home or building	9%	9%
Religious space	2%	2%
Hotel	11%	11%
Restaurant	16%	6%
Private club	7%	11%
Museum	1%	3%
Other, please specify:	10%	15%
Did / Will not occur	8%	1%
Not sure / still planning	11%	5%

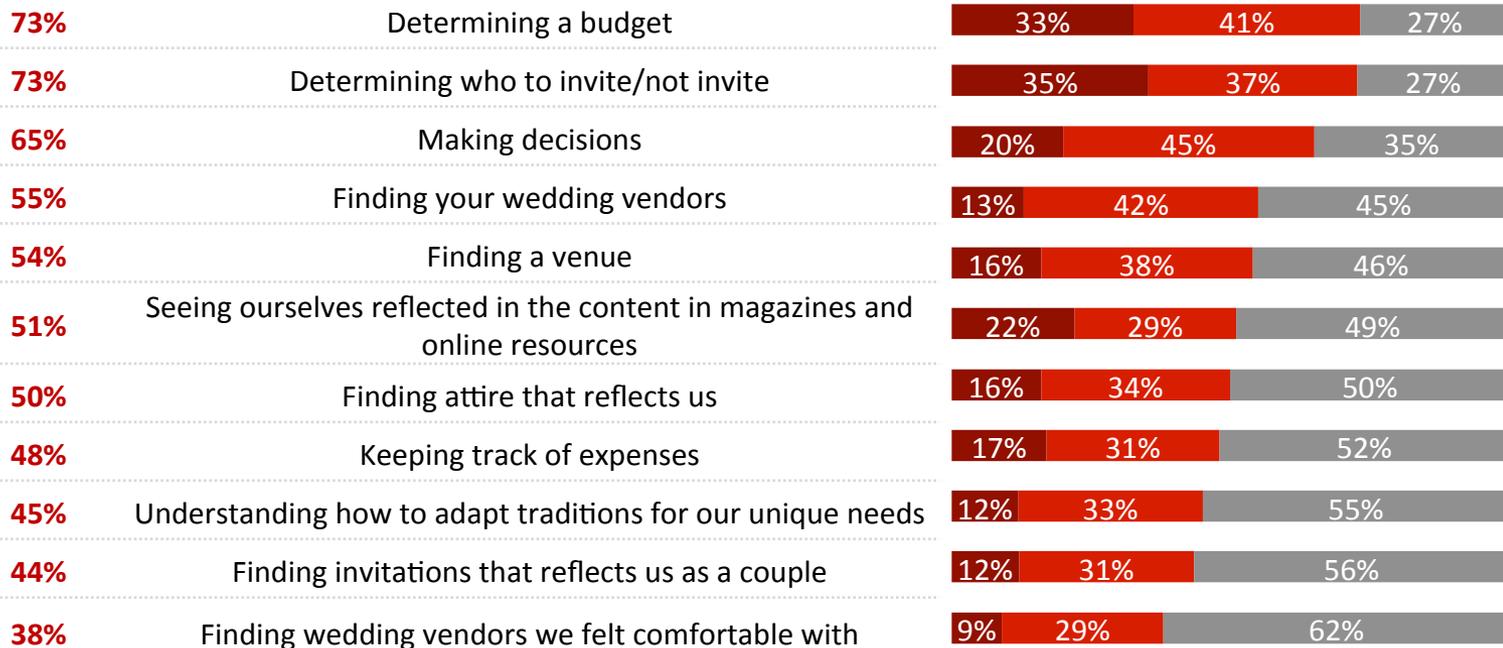
Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

Challenges for Same-Sex Couple: 55% of same-sex couples find it at least somewhat challenging to identify appropriate wedding vendors. 45% find it at least somewhat challenging to understanding how to adapt traditions for their unique needs. Weddings are new to the LGBT community, and wedding traditions don't always make sense for many same-sex couples. Wedding professionals need to avoid assumptions and listen to the unique concerns of all couples to help guide them in wedding planning.

How challenging have you found each of the following components of wedding planning?

Among Same-sex Married after 6/26/2015 or Engaged after 6/1/2013

Total Challenging

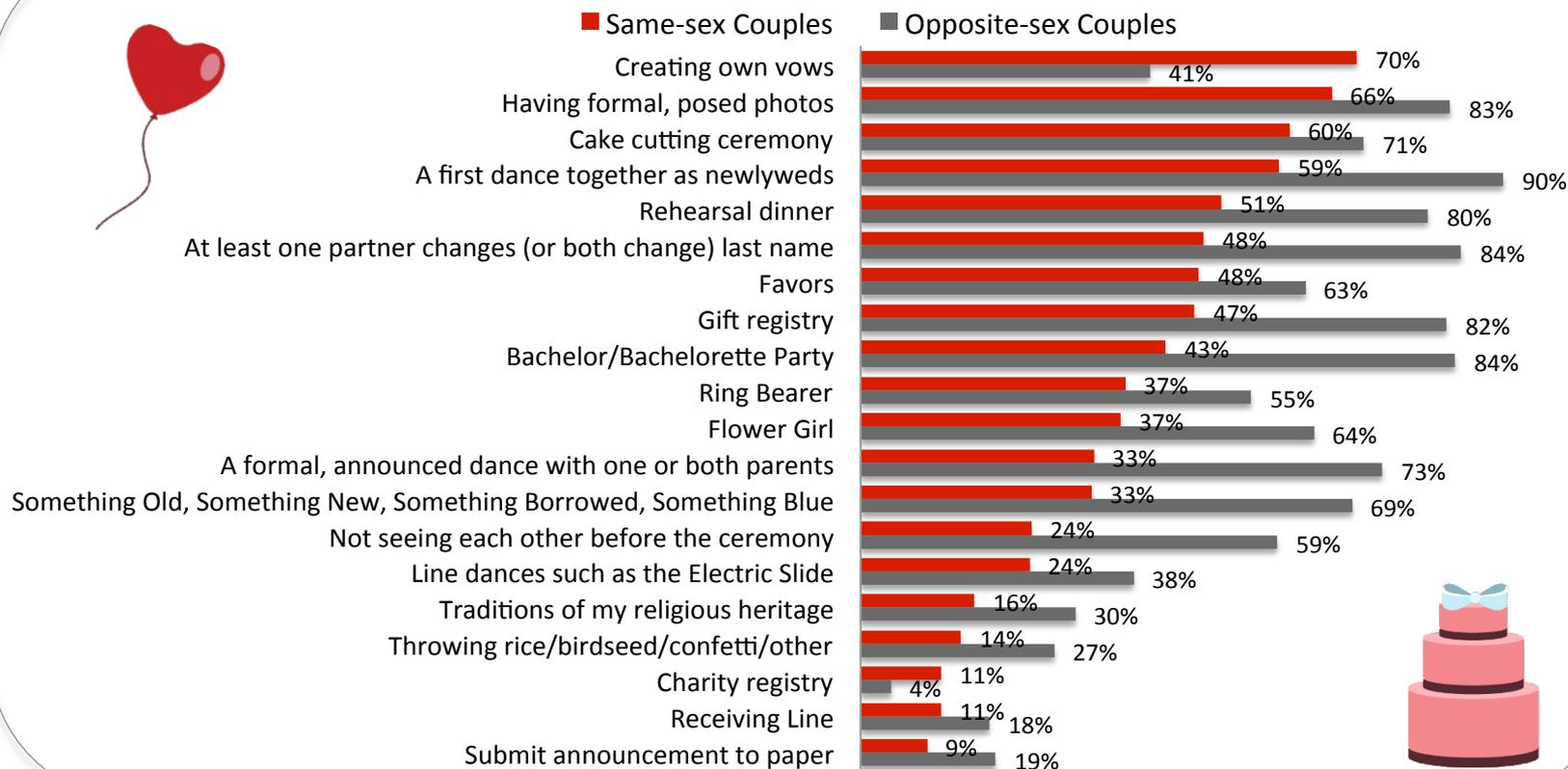


■ Very Challenging ■ Somewhat Challenging ■ Not Challenging

Base: Married/Engaged Same-sex Couples n=varies

Elements of a Wedding: With the exception of creating their own vows, same-sex couples are much less likely to use common elements of a wedding ceremony. This is likely because wedding traditions are often based on gender roles, which may not apply to many same-sex couples. Wedding professionals ought to keep in mind that same-sex couples are forming their own traditions, and should not assume that any element “should” be part of the ceremony or reception planning process.

Please tell us which of the following wedding traditions/tools you plan to use or have used? (check all that apply)



Base: Married/Engaged Same-sex Couples n=320; Married/Engaged Opposite-sex Couples n=576

Financial Support from Parents: Same-sex couples are far more likely than opposite sex couples to pay for the marriage themselves, with no support from parents. This is true for both male and female couples. There are multiple reasons: First, same-sex couples are, on average, older and may not need or want support from parents; many same sex-weddings are quite small with no support needed; and gender roles of the bride’s family offering significant support may be confusing for many families of same-sex couples. As families becomes more comfortable with same-sex marriage and the average age of same-sex couple weddings lowers, more family support is anticipated in the future.

Did/ Will you receive any financial support to help pay for the wedding from any of the following people? (Mark all that apply)

			Opposite-sex Couples
We are paying for most of / entire wedding ourselves	74%	74%	48%
My parent(s)	28%	34%	67%
My partner's parent(s)	17%	32%	51%
Other family members	7%	5%	13%
Other friends	4%	3%	3%
Other financial support	1%	3%	2%
Not sure / still planning	8%	4%	3%

Base: Married/Engaged Male Couples n=144; Married/Engaged Female Couples n=212; Married/Engaged Opposite-sex Couples n=584

Emotional Support from Family: Sadly, many same-sex couples report receiving less emotional support for their marriage from parents than do opposite-sex couples. Remember that same-sex couples trend older, so that means their parents trend older as well. Pew general market research polls show that older Americans are less supportive of same-sex marriage. Parent emotional support should improve over time. More encouraging, emotional support for same-sex couples from brothers and sisters was near equal to opposite-sex couples.

Did you have emotional support around your marriage / engagement and pending wedding from any of the following people? (Mark all that apply)

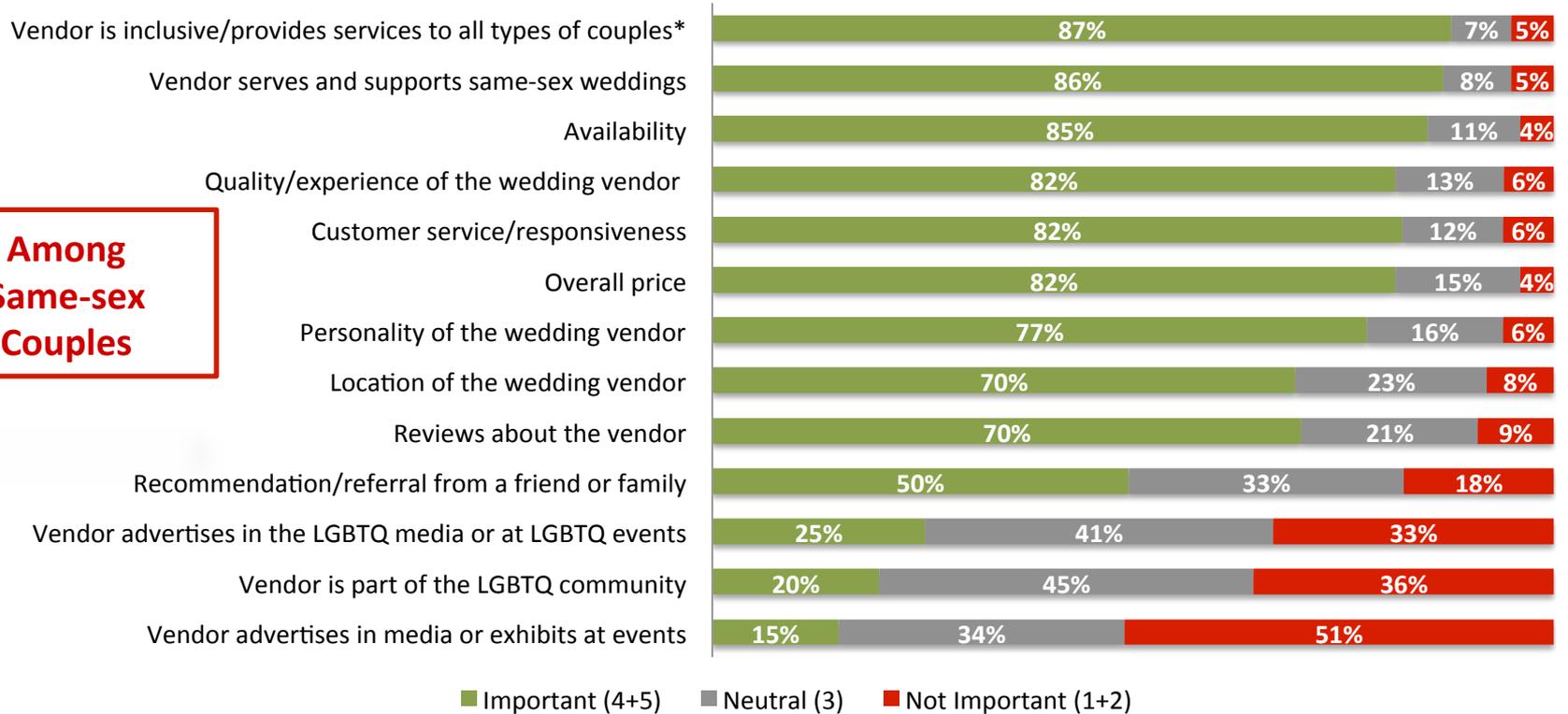
			Opposite-sex Couples
Friend(s)	92%	94%	91%
Coworker(s)	67%	71%	59%
My brother(s) or sister(s)	65%	68%	74%
My parent(s)	60%	66%	88%
Other family members	60%	68%	72%
My partner's brother(s) or sister(s)	59%	60%	63%
My partner's parent(s)	55%	60%	80%
My religious / spiritual group	17%	17%	24%
Other emotional support	22%	28%	15%
No emotional support	3%	1%	2%

Base: Married/Engaged Male Couples n=144; Married/Engaged Female Couples n=212; Married/Engaged Opposite-sex Couples n=584

Selection of Wedding Vendors by Same-Sex Couples: For same-sex couples selecting vendors, in addition to practical criteria like availability, price, experience and customer service, vendors need to be inclusive and support same-sex weddings. While vendors need to support same-sex weddings, vendors do not need to personally identify as being lesbian, gay, bisexual or transgender.

On a scale of 1-5, how important is the following when selecting wedding vendors (e.g., wedding planners, florists, photographers, DJ. etc.) to assist you with the ceremony? If you are not going to have any wedding vendors, just leave this question blank.

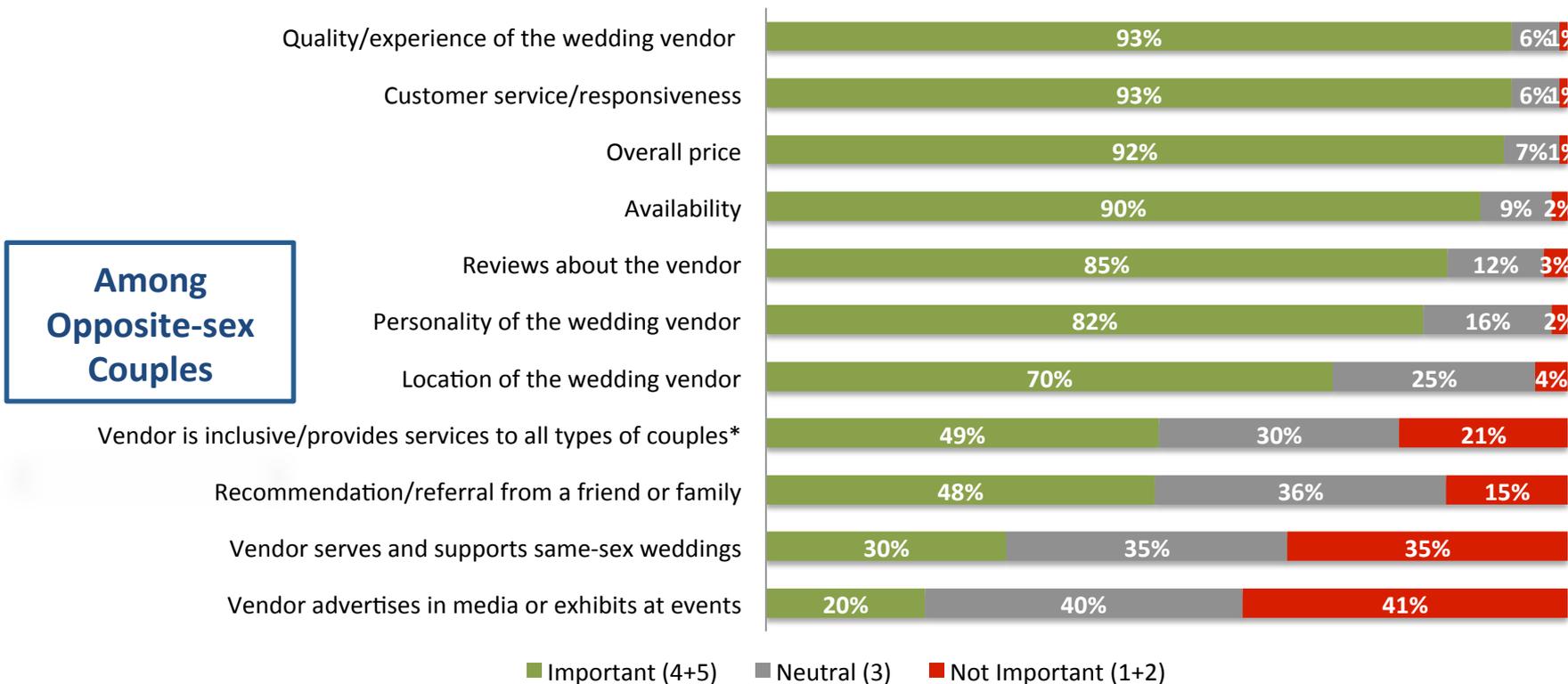
Among Same-sex Couples



*Vendor is inclusive/provides services to all types of couples regardless of gender, race, etc. Base: Married/Engaged Same-sex Couples n=varies

Selection of Wedding Vendors by Opposite-Sex Couples: For opposite-sex couples selecting vendors, practical criteria like availability, price, experience and customer service are most important. However, about half think it is important that a vendor be inclusive and provides services to all types of couples.

On a scale of 1-5, how important is the following when selecting wedding vendors (e.g., wedding planners, florists, photographers, DJ. etc.) to assist you with the ceremony? If you are not going to have any wedding vendors, just leave this question blank.



*Vendor is inclusive/provides services to all types of couples regardless of gender, race, etc.
 Base: Married/Engaged Same-sex Couples n=varies

Same-sex Couples Searching for Vendors: Same-sex couples use a wide variety of options to find wedding vendors. Looking at all categories, 55% of same-sex couples report using at least one type of LGBT-specific resource. Vendors that make themselves known to the LGBT community—whether it be via word of mouth or listing on an LGBT planning site—will get in front of potential new customers.

Among Same-sex Couples

How will you find (or already found) the vendors to help with your wedding plans? Please mark all that apply.

Search engine (e.g., Google, Bing)	52%
Recommended by friend	48%
Wedding planning website	41%
Recommended by another vendor	32%
Recommended by family	25%
Social media (e.g., Facebook, Twitter)	19%
Wedding show or expo	18%
Pinterest	13%
Had used them for another reason previously	12%
Saw at another wedding	10%
Wedding magazines	8%
Photo-sharing (e.g., Instagram, Snapchat)	8%
Blogs	6%

During your wedding planning process, have you used or will you use media and services that are specifically designed for or outreaching to the LGBT community? Please mark all that apply.

Known LGBT-friendly vendor (i.e. florist, caterer, DJ, etc.)	29%
LGBT-specific wedding website	28%
Recommendations specifically by LGBT friends	18%
LGBT-owned and operated vendor (i.e. florist, caterer, DJ, etc.)	15%
Vendors that advertised in the LGBT media	13%
LGBT blogs	11%
LGBT-friendly wedding planner	11%
LGBT wedding show or Expo	11%
LGBT identified wedding planner	7%
None of the above	45%

Base: Married/Engaged Same-sex Couples n=277 / 349

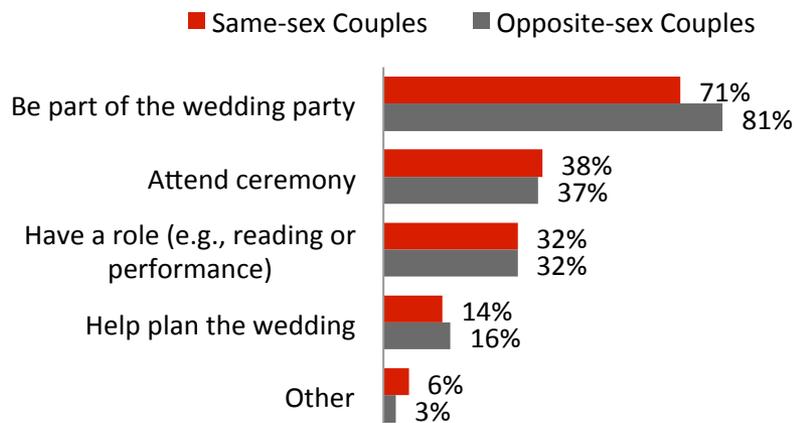
Children and Weddings: Since the Supreme Court ruling, many same-sex partners were both older and had been together for years before their marriage, which may have increased their odds of already having children before the marriage. Interestingly, same-sex and opposite-sex couples were just as likely to have children under age 18 at time of marriage, and same-sex couples were more likely to have children over age 18. Patterns of children taking part in the marriage ceremony were similar.

Do you or your spouse / partner have children? Mark all that apply.

<i>Same-sex Couples</i>		<i>Opposite-sex Couples</i>
15%	Yes over age 18	6%
20%	Yes under age 18	20%



Did / Will your or your partner's children under age 18 have a role in your wedding or ceremony? Mark all that apply.

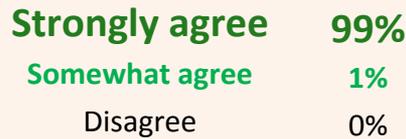


Base: Married/Engaged Same-sex Couples n=356; Married/Engaged Opposite-sex Couples n=584

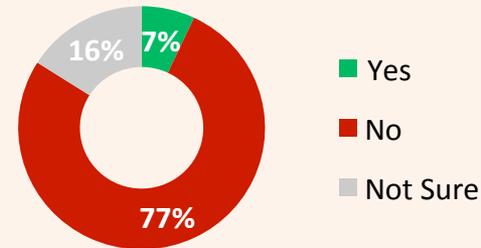
Same-Sex Couples, Marriage Equality and Attitudes towards Businesses: Not surprisingly, same-sex couples firmly agree with the recent Supreme Court of the United States ruling, feel that businesses should not be allowed to discriminate, and are very positive towards brands that use same-sex couples and marriage equality in their advertising.

Among Same-sex Couples

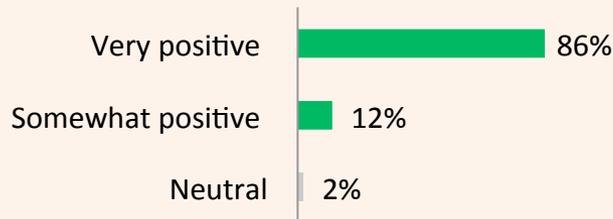
Do you agree with the recent Supreme Court of the United States decision legalizing same-sex marriage?



Do you think that wedding-related businesses should be allowed to refuse service to same-sex couples?

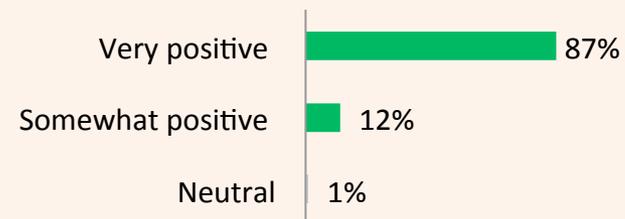


When you see a national brand or product advertisement featuring a same-sex couple as part of its imagery or message, how does it make you feel about the company?



* Negative options 0%

When you see a national brand or product advertisement featuring a same-sex couple getting married in its imagery or message in an advertisement, how does it make you feel about the company?



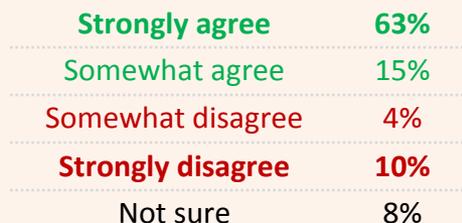
* Negative options 0%

Base: Married/Engaged Same-sex Couples n=356

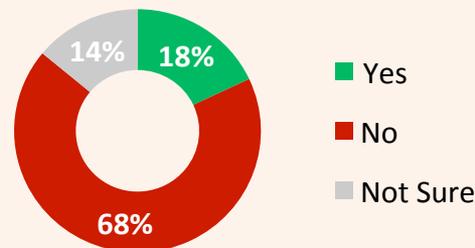
Opposite-Sex Couples, Marriage Equality and Attitudes towards Businesses: For opposite-sex couples, a strong majority agree with the recent Supreme Court of the United States ruling, feel that businesses should not be allowed to discriminate, and are positive towards brands that use same-sex couples and marriage equality in their advertising. These “supportive” numbers are stronger than many national polls have indicated, but remember the research participants were opposite-sex couples engaged or recently married, so these participants trend under age 35 and likely to be much more supportive of marriage equality.

Among Opposite-sex Couples

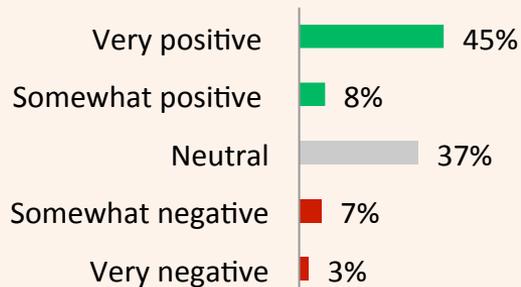
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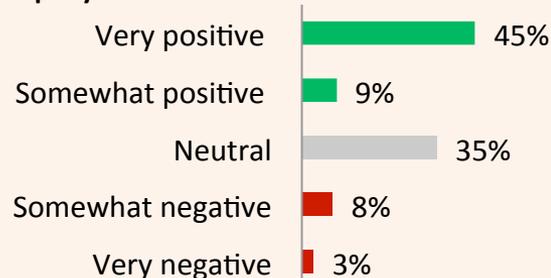
Do you think that wedding-related businesses should be allowed to refuse service to same-sex couples?



When you see a national brand or product advertisement featuring a same-sex couple as part of its imagery or message, how does it make you feel about the company?



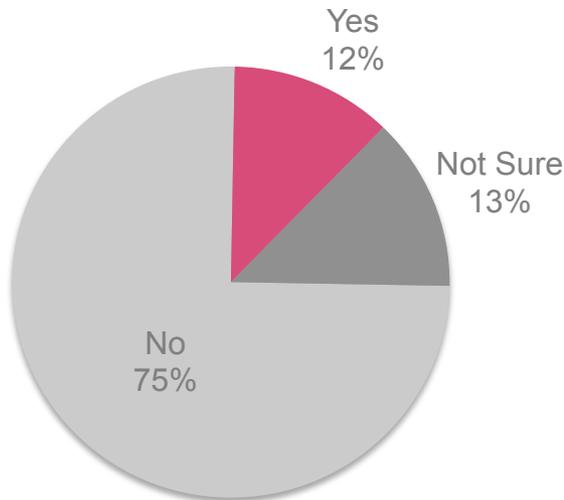
When you see a national brand or product advertisement featuring a same-sex couple getting married in its imagery or message in an advertisement, how does it make you feel about the company?



Base: Married/Engaged Opposite-sex Couples n=584

Same-Sex Couples and Discrimination: Twelve percent of engaged same-sex couples say that they've experienced discrimination, while 13% are uncertain. Same-sex couples continue to report a range of experiences from denial of services to prejudice in 'bridal bias' language and heteronormative assumptions. Additionally, some express general awkwardness in having to disclose their orientation and correct vendor assumptions.

 Experienced Discrimination in Planning Process



"None of the justices of the peace we contacted would perform the ceremony. Two never returned our calls."

- Lesbian/gay female couple, Wisconsin



"The most annoying thing is the paperwork for different vendors. It always says "bride" and "groom."

- Male couple, Massachusetts



"People assumed we were getting married to men and were sisters or best friends having a joint wedding."

- Lesbian/gay female couple, Washington



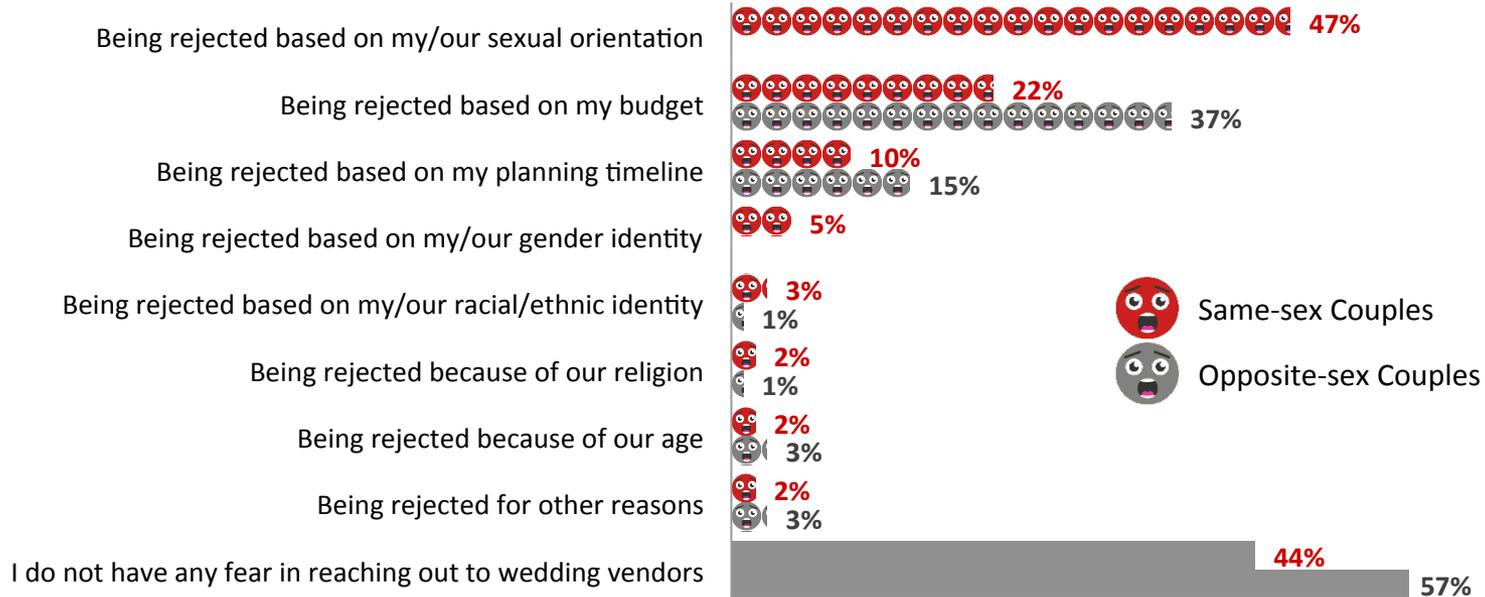
"Most vendors assume my fiancé is female when they hear my male voice. They always ask "what is the bride's name?"

- Male couple, New York

BASE: SS N=356

Feared Rejection by Vendors: More than half of same-sex couples have a fear of being rejected by vendors based on their sexual orientation or gender identity. While the majority of vendors support same-sex wedding business, vendors may need to communicate their support more directly to same-sex couples who have real fears of rejection. Those couples who do fear rejection may be only looking in specific LGBT resources for supportive vendors.

What do you most fear in reaching out to wedding vendors to inquire about services? Mark any that apply.



Base: Married/Engaged Same-sex Couples n=344; Married/Engaged Opposite-sex Couples n=579

Same-Sex Couples and Terminology: Many same-sex couples find the terms “spouse” and “partner” preferable over the terms “husband” and “wife.” Wedding planners and advertisers should keep that in mind and not assume that all same-sex couples prefer the terms “husband” or “wife.” Of interest, the favorability ratings for each term are near identical to CMI’s 2013 study when the question was previously asked.

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

Among all same-sex couples



Positive



Neutral



Negative

	Positive	Neutral	Negative
Spouse	81%	17%	2%
Same-sex couple	70%	28%	2%
Partners	62%	28%	10%
Same-sex partners	54%	36%	10%
LGBT couple	52%	39%	10%
Significant others	51%	37%	12%
Husband / Wife	48%	32%	20%
Same-gender couple	43%	46%	11%
Life partners	43%	39%	19%
LGBTQ couple	41%	45%	14%
Domestic partners	34%	42%	23%
Queer couple	23%	24%	53%

Base: Married/Engaged Same-sex Couples n=varies

Same-Sex Couples and Honeymoons: Hawaii is the most popular destination for LGBT honeymoons. However even though the destination has the highest percentage, Hawaii attracted only 8% of the total honeymoons. Overall, the destinations are quite dispersed, with a high number of beach destinations worldwide, mixed with urban core destinations in North America and Europe. Beach destinations are clearly preferred for same-sex honeymoons. Other CMI travel research points to lesbians being strong Caribbean and Mexico travelers, gay men being strong Florida and European travelers, and gay men and lesbians being more equal for Hawaii travel.

Please write the destination you traveled to or plan to travel to on your honeymoon.
Among Married in Past Year or Engaged (United States and Canadian Residents)



Top Destinations Provided

Any Destination in Hawaii	8%
Any Destination in Florida	7%
Any Destination in Mexico	5%
Any Destination in Canada	3%
Any Destination in France	3%
Las Vegas	3%
Australia	2%
Any Caribbean Destination	2%
San Francisco	2%
Any Destination in Spain	2%
Any Destination in Greece	2%
New Orleans	2%
New York City	2%

Base: All LGBT USA or Canada Residents, Married in Past Year or Engaged (Provided a Valid Destination) n=262 (71% of respondents engaged or married in the past year provided honeymoon destinations. Both United States and Canadian residents were reported for this question to achieve a higher response rate.)

Use of Same-Sex Imagery on Websites: This question was from CMI’s 2015 LGBT Tourism & Hospitality survey and was directed at tourism office websites. While not directly asking about wedding websites, the results could give some direction to wedding professionals asking how to be more inclusive of same-sex couples in their digital communications.

Some destination/tourism bureaus have “LGBT sections” on their websites.
Do you agree or disagree with these statements?

% in Agreement

	Gay and Bisexual Men	Lesbians and Bisexual Women	Millennials	Gen X	Boomers
Having an LGBT website makes me feel that the tourism bureau is LGBT-friendly.	89%	91%	89%	89%	91%
A tourism website should do both, have LGBT imagery throughout the site and offer a specific LGBT page of information.	85%	87%	85%	84%	88%
Having an LGBT website makes me more likely to visit a destination.	72%	70%	71%	70%	73%
Including LGBT imagery throughout a website is more important than an LGBT-specific section.	57%	69%	66%	65%	61%
I have viewed a tourism bureau’s LGBT page in the past 12 months.	54%	36%	37%	46%	50%
I had no idea that tourism bureaus offer LGBT website pages.	31%	45%	47%	39%	33%
LGBT sections on tourism bureau websites are no longer needed.	11%	9%	11%	11%	8%

Bases Vary Slightly by Statement: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406; USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

What Same-Sex Couples Care About Most: When asked about a series of issues facing the LGBT community today, same-sex couples that were married in the past year care about stopping anti-LGBT “religious freedom” legislation and protecting and expanding marriage equality. Both of these issues rate in the top tier of their LGBT community concerns.

What are your priorities for the LGBT movement for the next 10 years? Please check the LGBT causes that motivate you to volunteer, donate, support, get involved, etc. Please limit your choices to those that are most important to you. Do not check all.



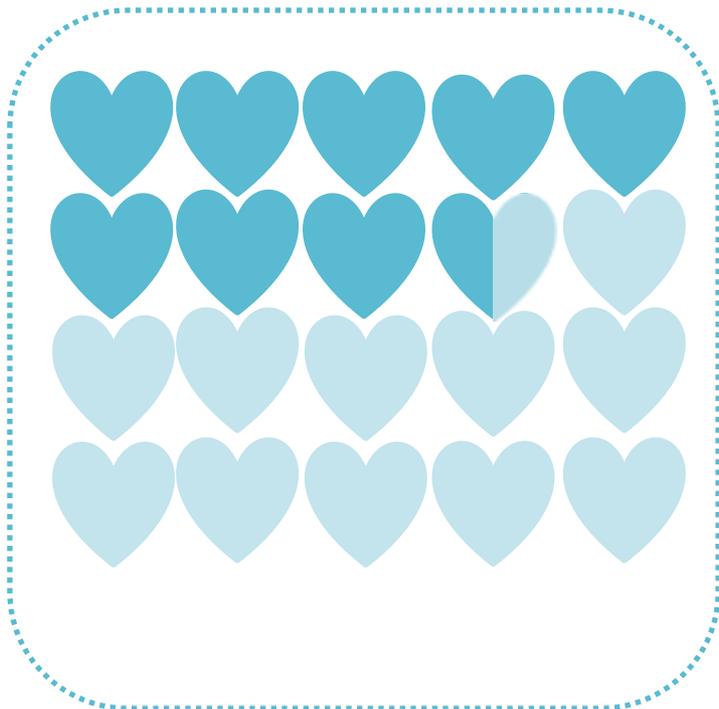
Stopping anti-LGBT “religious freedom” legislation	66%
LGBT youth, anti-bullying and/or teen suicide issues	60%
Workplace equality	51%
Protecting and expanding marriage equality	51%
Supporting LGBT-friendly political candidates	46%
Supporting LGBT political candidates	40%
Transgender rights	34%
HIV education and care	29%
International LGBT rights	25%
Expanding LGBT roles, visibility and influence in rural areas	24%
Expanding LGBT roles and influence in religious communities	16%



Base: All USA LGBTs married in the past year n=649

Economic Outlook: Most same-sex couples married in the past year have a positive economic outlook. However on the five-point scale presented, most rated their outlook a 4, not a 5.

On a 5-point scale, how would you rate your current financial situation?



5 – Very Positive, I’m doing great financially	19%
4 – Positive, Financially doing better than most	50%
3 – Neutral, I’m doing alright financially but just breaking even	24%
2- Negative, I’m falling behind financially	5%
1 – Very Negative, I am struggling to make financial ends meet	2%

Base: All USA LGBTs married in the past year n=649

Purchases: Same-sex couples that were married in the past year have excellent purchase patterns for many different products. Marriage is a time when couples are making a major change in lives, and may prompt other major purchases. Many different types of companies can include marriage equality as part of their overall LGBT marketing efforts.

Have you (or you and your partner) purchased any of the following major items during the past 12 months? (Please mark all that apply.)



36%



Major piece of furniture (U.S. \$500 or more)

32%



Purchased (or leased) a new automobile

31%



Audio or visual electronics for home (U.S. \$500 or more)

16%



Major home remodel

13%



Purchased a new primary home or condo

3%



Purchased a vacation home or timeshare

Base: All USA LGBTs married in the past year n=649

Experience Purchases: Same-sex couples that were married in the past year have excellent purchase patterns for many “experience-based” products and services. Not surprisingly, travel is high on this list (with presumed honeymoons). Many different types of “experience-based” companies and organizations can include marriage equality as part of their overall LGBT marketing efforts.

**Have you purchased any of the following experiences during the past 12 months?
(Please mark all that apply.)**



80%



Vacation of any length

57%



Tickets to a live theater production

49%



Salon services or spa treatments

47%



Tickets to a cultural performance (e.g. ballet, opera, symphony)

38%



Tickets to a headliner music concert

26%



Tickets to a non-profit fundraising event of U.S. \$100 or more

Base: All USA LGBTs married in the past year n=690

THANK YOU

FOR MORE INFORMATION



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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.

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.

Proud to serve these and other companies, organizations, universities, government institutions and researchers with

**LGBT Community Studies,
Strategic Consulting and Corporate Training**
since 1992