

LGBTQ WEDDINGS IN 2018

A Study of Same-sex and Queer-Identified Couples

In partnership with

**EQUALITY
INSTITUTE**





About Community Marketing & Insights and Equality Institute

Community Marketing & Insights (CMI) has been conducting LGBTQ consumer research for 25 years. Our practice includes online surveys, in-depth interviews, focus groups (on-site and online), intercepts, and advisory boards in North America, Europe, Asia and Australia. 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. CMI studies have been produced for these and many other clients: AARP, Freddie Mac, American Cancer Society, Planned Parenthood, Kaiser Family Foundation, Wells Fargo Bank, Credit Suisse, Aetna Insurance, New York Life, Aurora Health Care, DIRECTV, Target Brands, Johnson & Johnson, WNBA, Esurance, Hallmark, Greater Fort Lauderdale Convention & Visitors Bureau, Las Vegas Convention & Visitors Authority, NYC & Company, Kimpton Hotels & Restaurants., W Hotels, Tourism Toronto, Argentina Tourism Office, Tourism Office of Spain, Hawai'i Tourism Authority, United States Census Bureau, US Housing & Urban Development, and numerous other corporations and organizations across North America and around the world.

Equality Institute. Since 2009, Equality Institute has provided thoughtful, interactive training and consulting solutions to enhance sales, marketing, communication, and customer service to LGBTQ and other diverse colleagues, guests and customers. Our work also addresses unconscious bias, how to be an advocate at work, and is designed to inspire meaningful dialogue and improve organizational culture. Past clients have included Marriott, Hard Rock, MGM, Sands Hotels, and many others.



LGBTQ WEDDINGS IN 2018

Key Findings

KEY FINDINGS

Fear of a reversal of same-sex marriage

Two out of three LGBTQ couples expressed concern about religious freedom laws and concern that there could be a successful legal challenges reversing the right of same-sex couples to marry in the United States. Just over half (53%) of LGBTQ couples are confident that marriage equality will remain in all 50 states five years from now. The other half mostly feel that we will return to that place where same-sex couples can be married in some states and not others.

LGBTQ couples are still facing discrimination in wedding planning

Of the 20% of participants who reported some type of discrimination or negative experience during their wedding planning process, female-same sex couples, non-binary couples, Millennials and those more recently married were most likely to make reports. Reports were high in both liberal and conservative states. There is strong fear (61%) among transgender and non-binary identified couples regarding rejections from wedding vendors. Fear also exists among a high percentage of same-sex couples (44%).

Wedding vendor selection

The most important qualities that LGBTQ couples are looking for in a wedding vendor are inclusiveness, experience, responsiveness, fair price, and some experience supporting LGBTQ weddings. Couples did not need vendors to actually be part of the LGBTQ community. It is important for same-sex couples to see at least some LGBTQ couples on a wedding vendor's website. LGBTQ couples also like to see open acknowledgement that the company serves same-sex couples.

Shorter time periods until marriage

As more years pass since the establishment of marriage equality in the USA, the number of years from meeting to marriage appears to be shrinking. This makes sense: the original wave of same-sex wedding couples were often together for decades but not able to marry.

Same-sex couples often pay for marriage themselves

The vast majority of LGBTQ couples said that they paid for most, if not all, of the costs of their wedding. This lack of family financial support most likely influences wedding budget.

KEY FINDINGS

Getting married closer to home

In the past, same-sex couples often needed to travel to other states or countries to get married. Since marriage equality, most LGBTQ couples now get married in the same state in which they live. However, a healthy percentage (18%), do get married in other states or countries, making destination weddings important within the wedding industry.

Smaller weddings means more flexibility

Most LGBTQ couples that had a ceremony with invited guests planned celebrations in the 50 to 150 guest range. Very few had celebrations over 150. This means that LGBTQ couples have a lot more options for where they can hold their ceremonies, and opens doors for many different types of venues to promote weddings to LGBTQ couples.

Rings

Over 90% of LGBTQ couples continue the tradition of wedding rings. The survey found some weakness on the concept of engagement rings for male same-sex couples

LGBTQ couples establishing their own traditions

With the exception of creating their own vows and photos, LGBTQ couples are much less likely to use “traditional” 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. 43% of study participants said that it was important to bring some element of LGBTQ culture into their wedding, far more than religious or wedding traditions. Gender plays an important role in these wedding elements. Male same-sex couples are far more likely to reject these wedding traditions.

Lack of connection with religious institutions

On multiple questions throughout the survey, we see LGBTQ couples disconnected with religious institutions in the marriage process. Religious institutions need to do a better job outreaching to LGBTQ couples to let them know that they are welcome in their religious spaces and communities.



LGBTQ WEDDINGS IN 2018

About the Research

ABOUT THE 2018 LGBTQ WEDDING SURVEY

RESEARCH METHODOLOGY & ASSUMPTIONS

ABOUT THE RESEARCH

The 10-minute online survey was conducted in August/September 2018 by Community Marketing & Insights (CMI) in partnership with Equality Institute. The goal was to explore the changing wedding and engagement needs and concerns of LGBTQ couples. Survey respondents were recruited as known married or engaged LGBTQ community members who were part of the CMI proprietary LGBTQ research panel, as well as clients and contacts of Equality Institute. CMI has built a proprietary research panel of 90,000+ LGBTQ consumers through partnerships with more than 300 LGBTQ publications, websites, blogs, social media, apps, events and organizations over a twenty-year period. Equality Institute sent emails to their client and contact list, some of which took the survey or promoted the survey to their network.

WEIGHTING OF DATA

In order to balance opinion of same-sex couples, the data was weighted as follows; 46% were female same-sex couples, 46% male same-sex couples, 2% opposite-sex couples, and 6% non-binary identified couples.

LGBTQ PARTICIPANTS

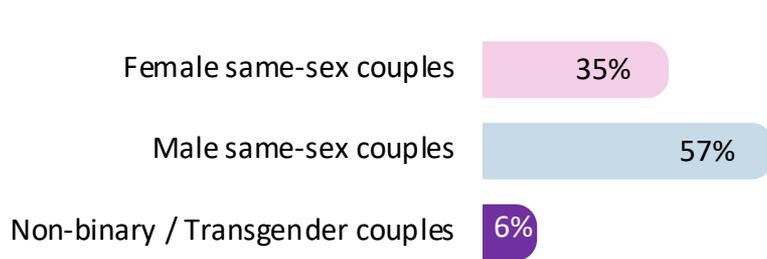
The research consisted of 808 LGBTQ community members who were married in the past three years (687) or engaged to be married in the past two years (121). Of total participants, 35% were female same-sex couples, 57% male same-sex couples, 2% opposite-sex couples, and 6% non-binary identified couples where one or both partners identified as transgender or outside the gender binary. In addition, 9% identified as a queer couple, but also identified as one of the other categories. All opposite-sex couples included at least one partner who identified as being part of the LGBTQ community. The research intentionally recruited same-sex and queer couples. LGBTQ community members in opposite-sex relationships are under-represented in the research.

ANALYSIS OF EACH QUESTION

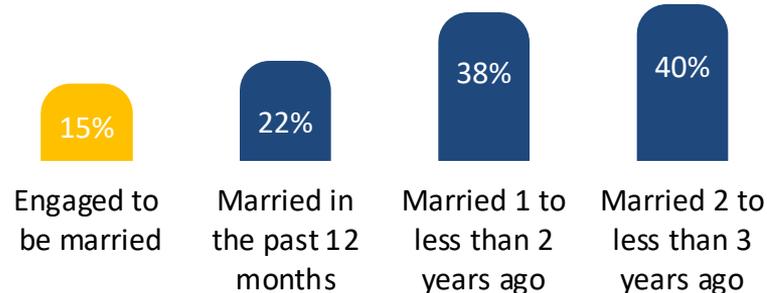
Questions were analyzed using different sub-groups of all participants as indicated in each question. All bases are identified at the bottom of each page.

LGBTQ WEDDING SURVEY PARTICIPANT PROFILE, N=808

IDENTITY

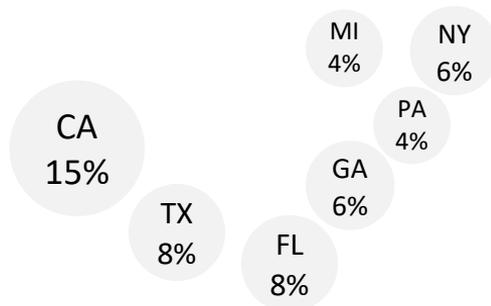


RELATIONSHIP

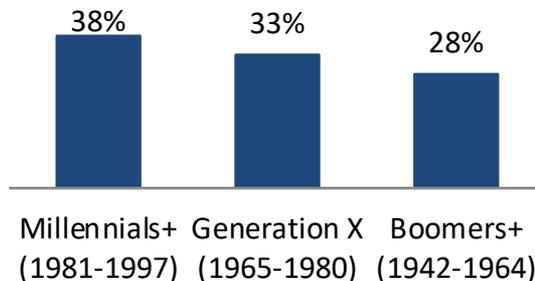


TOP STATES

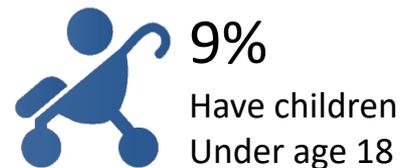
47 of 50 states represented



GENERATIONS



CHILDREN



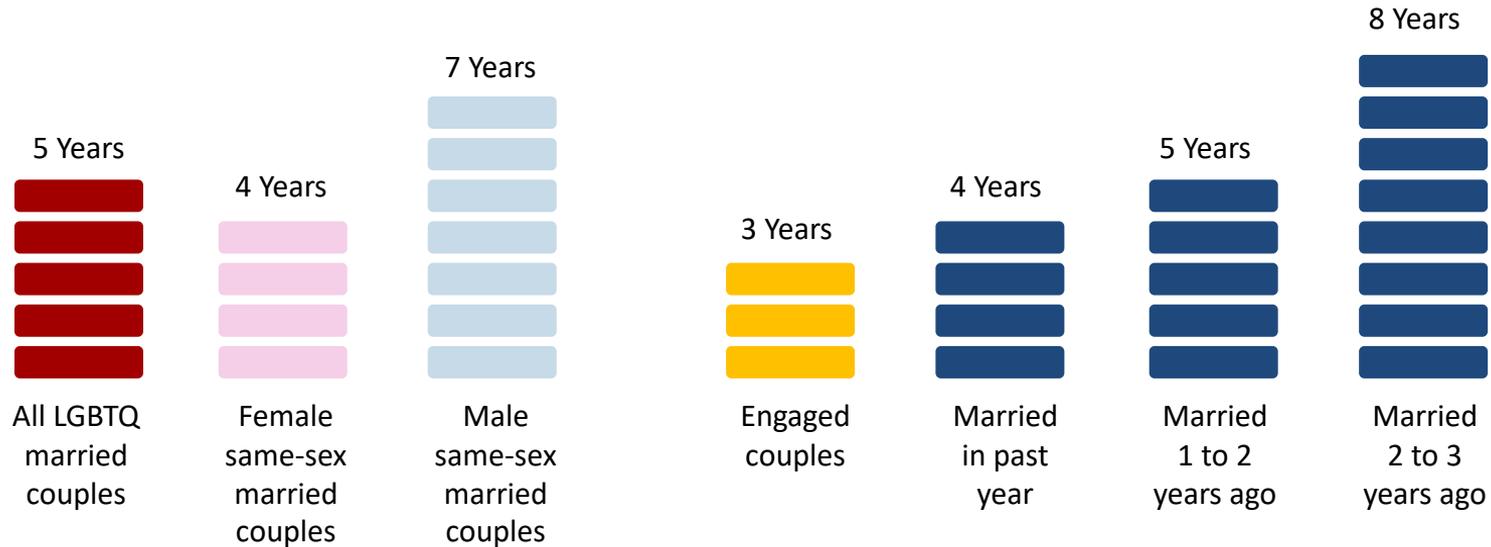


LGBTQ WEDDINGS IN 2018

Marriage and Wedding Trends

Years Together Before Marriage: Among engaged couples and those who were married in past three years, two trends can be identified: First, female couples tend to know each other for fewer years than male couples before committing to marriage. Second, as more years pass since marriage equality, the number of years from meeting to marriage appears to be shrinking.

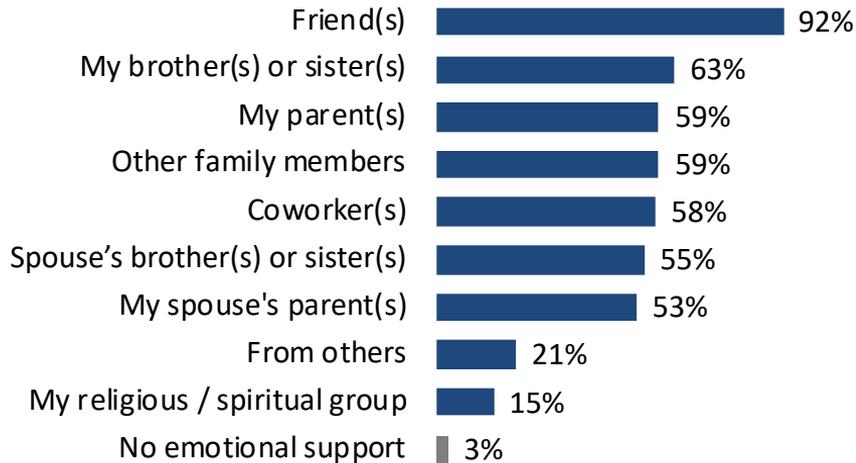
How many years were you with your partner (dating, living together, etc.) before your marriage ceremony (or engagement)?



Base: Weighted married couples n=687, married female same-sex couples n=233, married male same-sex couples n=409, engaged couples n=121, married in past year n=151, married 1 to 2 years ago n=261, married 2 to 3 years ago n=275

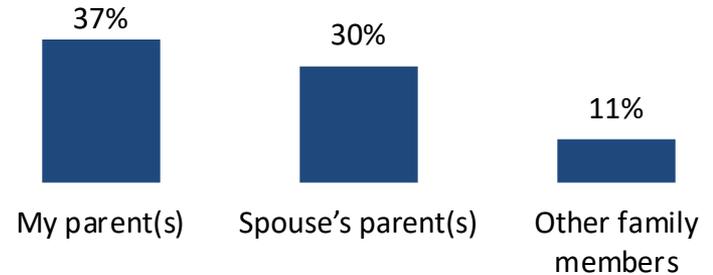
Emotional and Financial Support: While LGBTQ couples have emotional support from a wide variety of relationships, it is somewhat disheartening to see the percentages from direct family. Importantly, the vast majority of LGBTQ couples said they paid for most, if not all, of the costs of their wedding. This lack of family financial support most likely influences wedding budget.

Did you have emotional support around your marriage or engagement from any of the following people? (Please mark all that apply.)



Did you or will you receive or have you received any financial support to help pay for the wedding from any of the following people? (Please mark all that apply.)

Among those anticipate expenses connected to wedding



74% Said they paid or are paying for most of / entire wedding themselves

Base: Emotional support: Married in past three years or engaged to be married n=808
 Financial support: Of married and engaged couples with some expenses connected to wedding n=616

Marriage Location: In the past, same-sex couples often needed to travel to other states or countries to get married. Since marriage equality was established in the USA, most LGBTQ couples now get married in the same state in which they live. However, a healthy percentage (18%), get married in other states or countries, making destination weddings an important component of the overall wedding industry. For those who got married internationally, about half indicated that Mexico was their destination wedding of choice, with Canada, European and South American countries making up the other half.

Where did you get married or will you get married?

82%



In the same USA state
where I currently live

16%



Traveled to a different USA state
to get married

2%



Traveled to a different country
to get married

Base: All married and engaged couples n=808

Type of Marriage: Many LGBTQ couples were together for years or decades before marriage equality. For these older couples, many choose not to have an elaborate ceremony with many guests. As the chart below shows, as we move further in time since the Supreme Court marriage equality ruling, new couples are far more likely to choose ceremonies with guests.

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



Applied for license by mail,
simple ceremony at city hall /
no ceremony or legal elopement

■ Married 1-3 years ago
■ Married past year + Engaged



Ceremony and reception
for invited guests
(of any size)



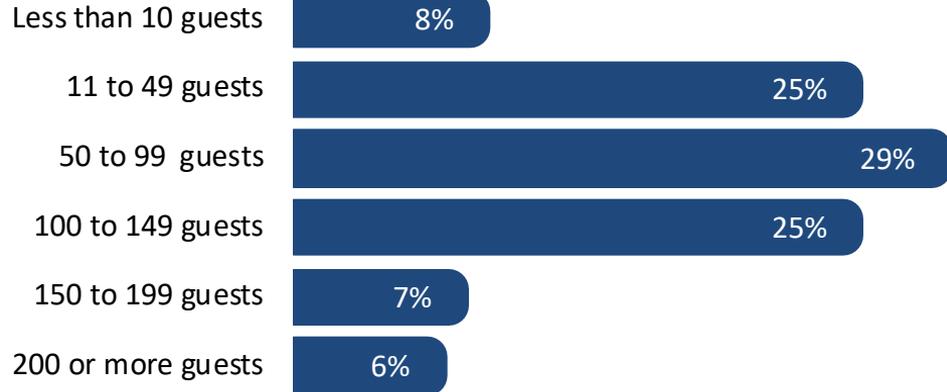
Base: Married 1 to 3 years ago and n=516, Married in past year and engaged with specific plans n=257

Number of Guests: Most LGBTQ couples that had a ceremony with invited guests planned celebrations in the 50 to 150 guest range (average of 92 guests). Only 13% had celebrations over 150. This means that LGBTQ couples have a lot more options for where to hold their ceremonies (see next slide).

How many guests attended or do you plan to invite to the reception?

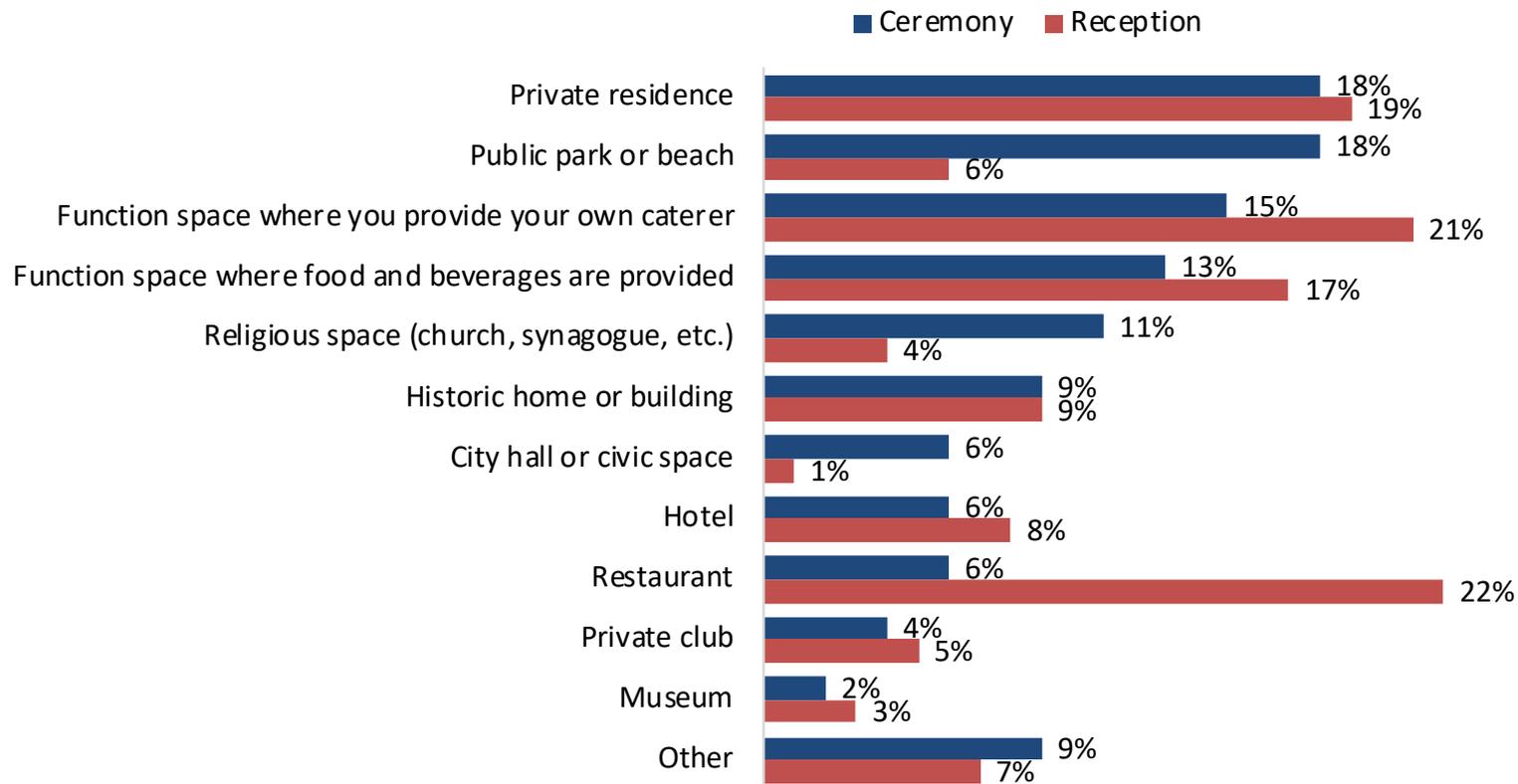
Reception (Dinner or Event)

Among those married in past year or engaged and planning



Base: Married in past year or engaged to be married n=203 (with invited guests)

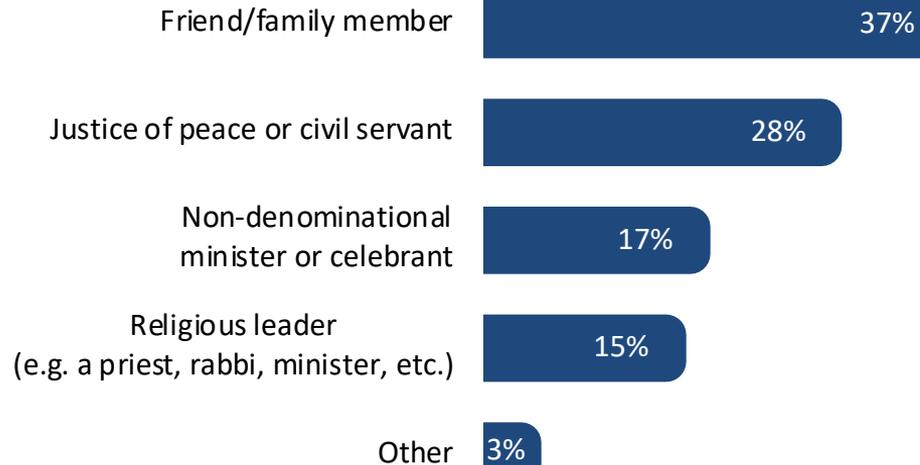
Where was/will your wedding ceremony/reception be held?



Base: Married or engaged participants indicating wedding with invited guests n=540 for ceremony; n=536 for reception

Officiants of LGBTQ Weddings: LGBTQ couples get married in partnership with a wide variety of officiants. Of note is the modest number married by religious leaders.

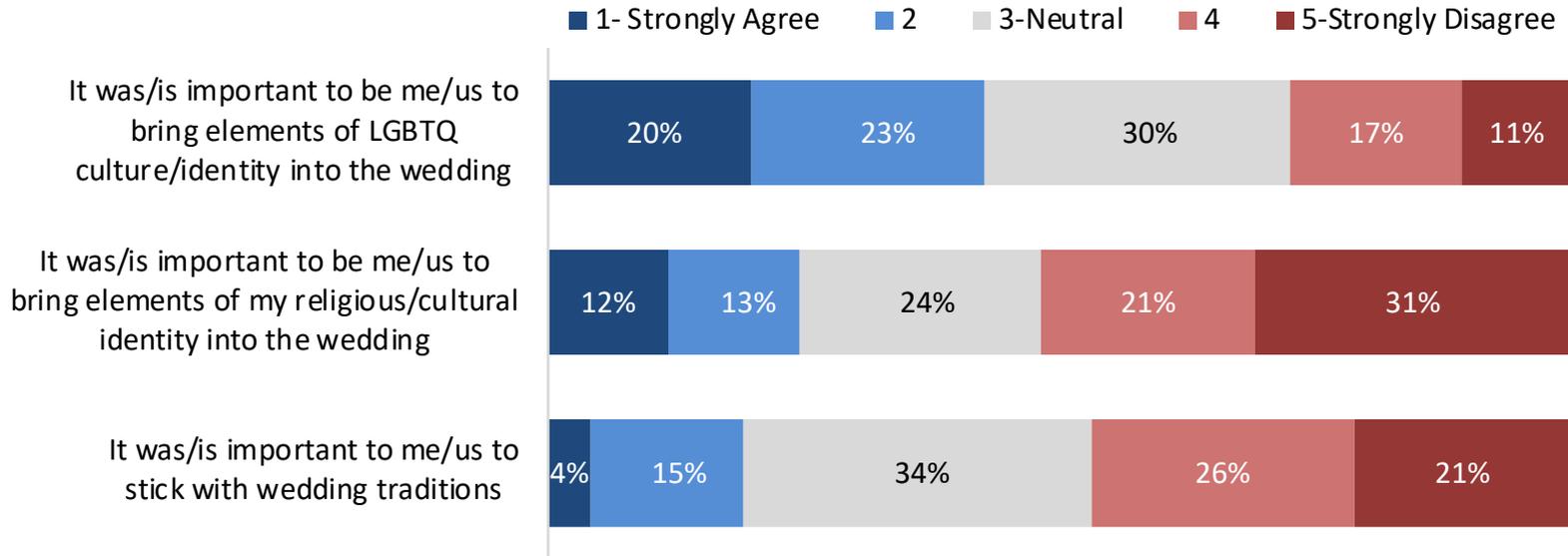
Who was or is going to be the officiant at your wedding?



Base: Married or engaged participants indicating an officiant n=776

Wedding Tradition: 43% of participants said that it was important to bring some element of LGBTQ culture into their wedding, far more than religious or wedding traditions.

When planning your wedding, how much do you agree or disagree with the following statements?



Base: Married or engaged participants who held/will hold ceremony and reception for invited guests n=546

Elements of a Wedding: With the exception of creating their own vows and photos, LGBTQ couples are much less likely to use “traditional” 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 not assume that any element “should” be part of the ceremony or reception planning process.

Please tell us which of the following wedding traditions you used? (Please mark all that apply.)

Having formal, posed photos	70%	Post-wedding brunch for guests	30%
Creating own vows	69%	A formal, announced dance with one or both parents	30%
Cake cutting ceremony	66%	Using an alternative registry (e.g., down payment on home, honeymoon)	30%
A formal first dance together as newlyweds	56%	Ring Bearer	26%
Rehearsal dinner / welcome reception for guests	51%	Something Old, Something New, Something Borrowed, Something Blue	25%
Favors	48%	Wedding shower	24%
Gift registry	47%	Flower Girl	24%
At least one partner changes (or both change) last name	39%	A first look	22%
Wearing white	38%	Not seeing each other before the ceremony	20%
Mixed-gender wedding parties	38%	Line dances such as the Electric Slide	17%
Bachelor/Bachelorette Party	37%	Receiving line	13%
Being escorted down the aisle by parent(s)	36%	Charity registry	10%
Having you and/or your wedding party formally introduced by the DJ/Band	34%	A garter and/or bouquet toss	10%
Engagement photos	34%		

Base: Married or engaged participants indicating wedding with invited guests N=540

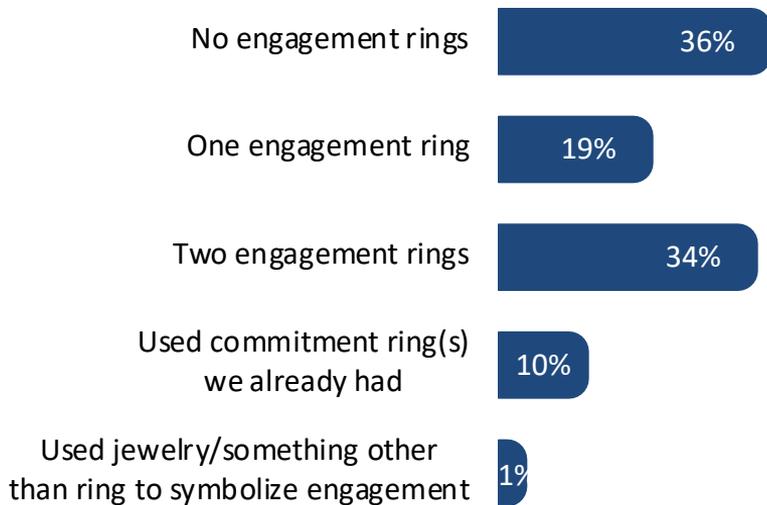
Elements of a Wedding: Gender plays an important role in these wedding elements (see previous slide). Male same-sex couples are far more likely to reject these wedding traditions.

	Female Couple	Male Couple		Female Couple	Male Couple
Having formal, posed photos	77%	58%	A formal, announced dance with one or both parents	38%	22%
Creating own vows	70%	61%	Wedding shower	35%	12%
Cake cutting ceremony	66%	66%	A first look	35%	6%
A formal first dance together as newlyweds	65%	40%	Using an alternative registry	34%	20%
Wearing white	63%	4%	Something Old, Something New, Something Borrowed, Something Blue	33%	13%
Favors	57%	37%	Ring Bearer	31%	18%
Rehearsal dinner / welcome reception for guests	54%	45%	Flower Girl	31%	16%
Gift registry	52%	36%	Not seeing each other before the ceremony	30%	7%
At least one partner changes (or both change) last name	50%	21%	Post-wedding brunch for guests	27%	32%
Being escorted down the aisle by parent(s)	49%	19%	Line dances such as the Electric Slide	23%	10%
Bachelor/Bachelorette Party	46%	25%	A garter and/or bouquet toss	17%	2%
Mixed-gender wedding parties	46%	30%	Traditions of my religious heritage	16%	17%
Engagement photos	41%	25%	Receiving line	14%	11%
Having wedding party formally introduced by the DJ/Band	40%	27%	Charity registry	9%	9%

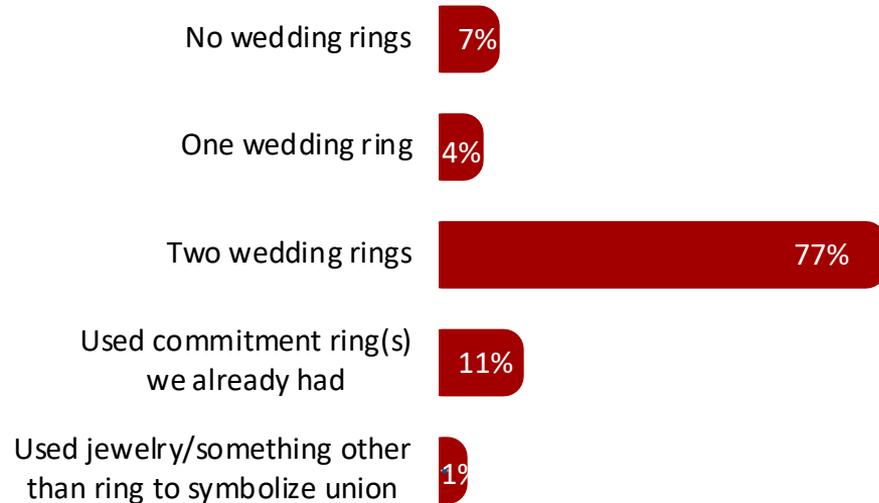
Base: Married or engaged participants indicating wedding with invited guests
Female same-sex couple n=202; Male same-sex couple n=292

Rings: Most LGBTQ couples continue the tradition of wedding rings and engagement rings. Wedding rings are especially common for LGBTQ couples. Male same-sex couples are not likely to exchange engagement rings, which reduces the overall LGBTQ couple percentages.

Did you purchase / exchange one or more engagement rings?



Did you purchase / exchange one or more wedding rings?



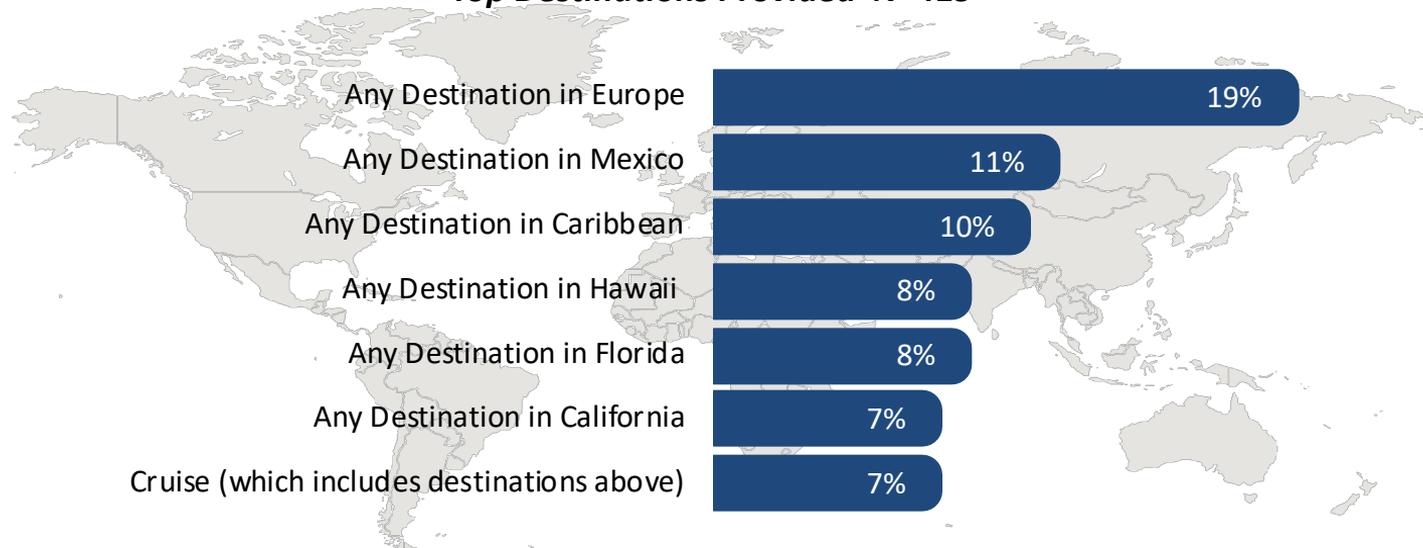
Base: Married or engaged participants n=808 engagement rings; n=802 wedding rings (engaged couples were still not sure about wedding rings)



Honeymoons: Among couples that stated their honeymoon destinations, the locations were 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. Male same-sex couples were especially drawn to European destinations, while female couples were more drawn to beach destinations in Mexico and the Caribbean.

Please write the destination you traveled to or plan to travel to on your honeymoon.

***Among Married in Past Three Years or Engaged
Top Destinations Provided N=419***



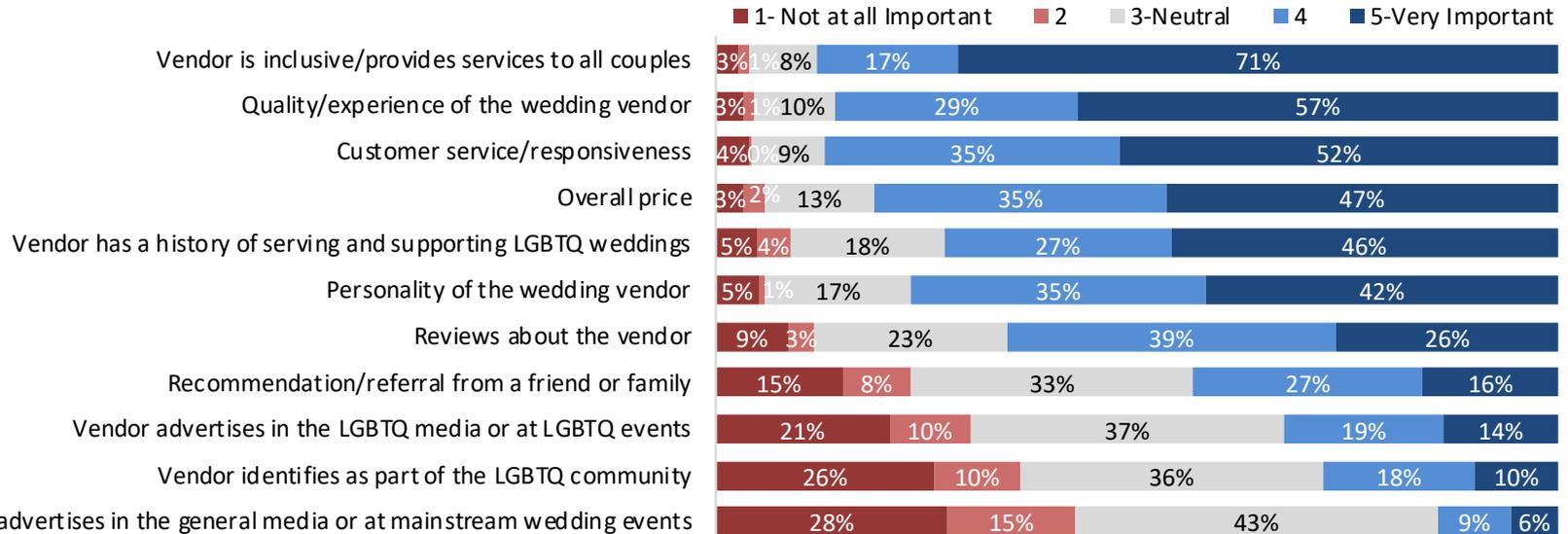


LGBTQ WEDDINGS IN 2018

Selecting Wedding Vendors and Media

Wedding Vendor Selection Criteria: The most important qualities that LGBTQ couples are looking for in a wedding vendor are inclusiveness, experience, responsiveness, fair price, and some experience supporting LGBTQ weddings. Couples did not need vendors to actually be part of the LGBTQ community.

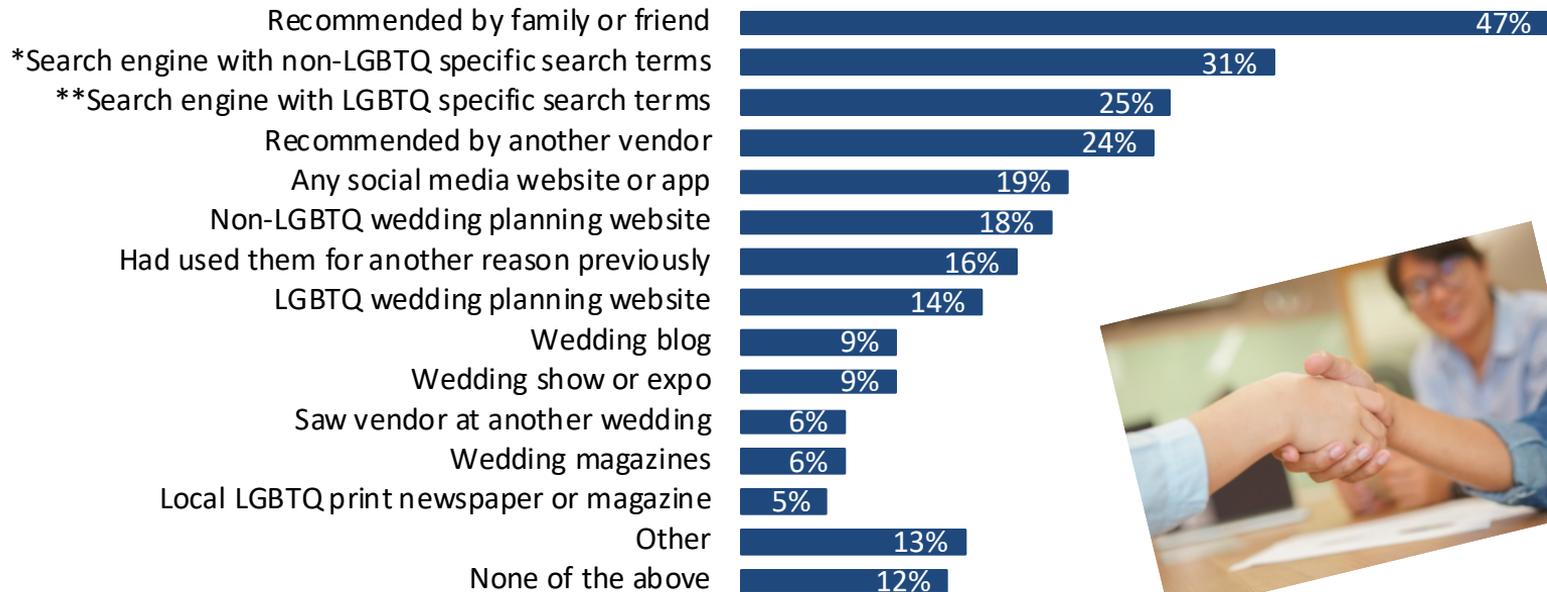
On a scale of 1-5, how important was/is the following when selecting wedding vendors (e.g., location, wedding planners, florists, photographers, DJ, etc.) to assist you with your most recent/upcoming wedding ceremony/reception? If you did/will not have any wedding vendors, just leave this question blank.



Base: Married or engaged participants who held/will hold ceremony and reception for invited guests n=483-492

Wedding Vendors: LGBTQ couples used a variety of sources to find wedding vendors. Personal referrals were very important, as were internet searches. To find vendors, some LGBTQ community members did use media sources, but they were not as important as “reputation” sources.

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



Base: Married or engaged participants indicating wedding with invited guests and started planning process n=534

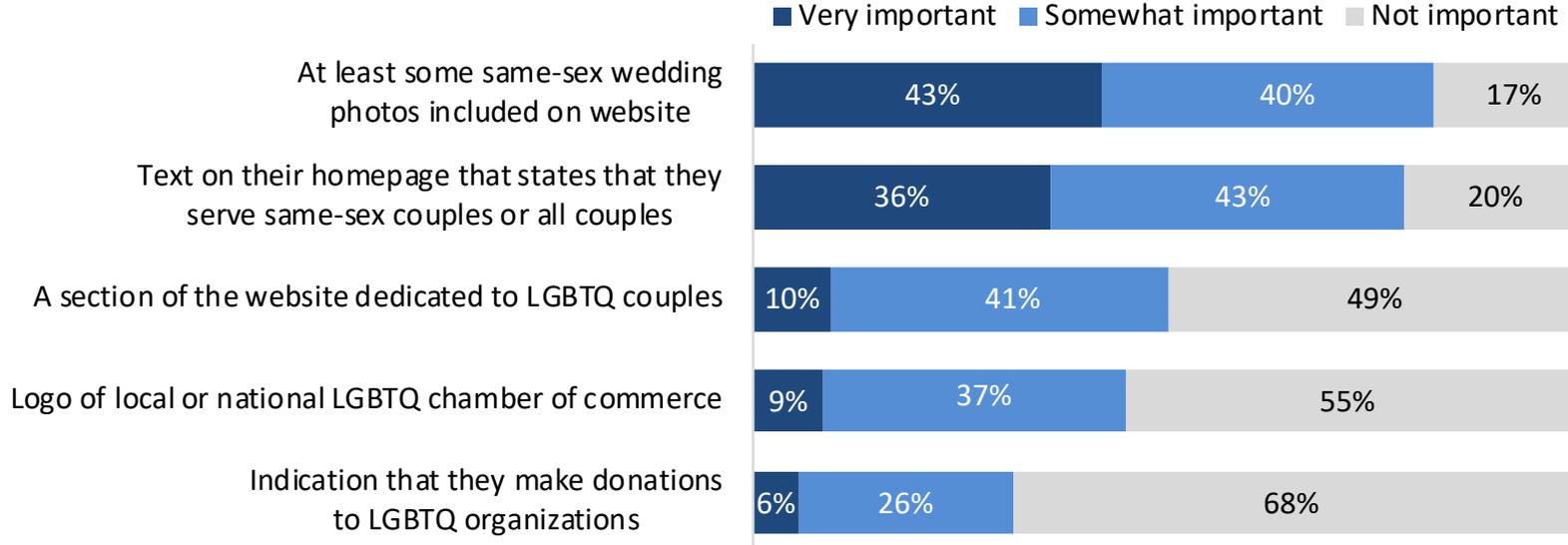
*Search engine (e.g., Google, Bing) with non-LGBTQ specific search terms (e.g. wedding photographer)

**Search engine (e.g., Google, Bing) with LGBTQ specific search terms (e.g. LGBTQ wedding photographer)



Wedding Vendors' Websites: It is important for same-sex couples to see at least some LGBTQ couples on a wedding vendor website. LGBTQ couples also like to see acknowledgement that the company serves same-sex couples.

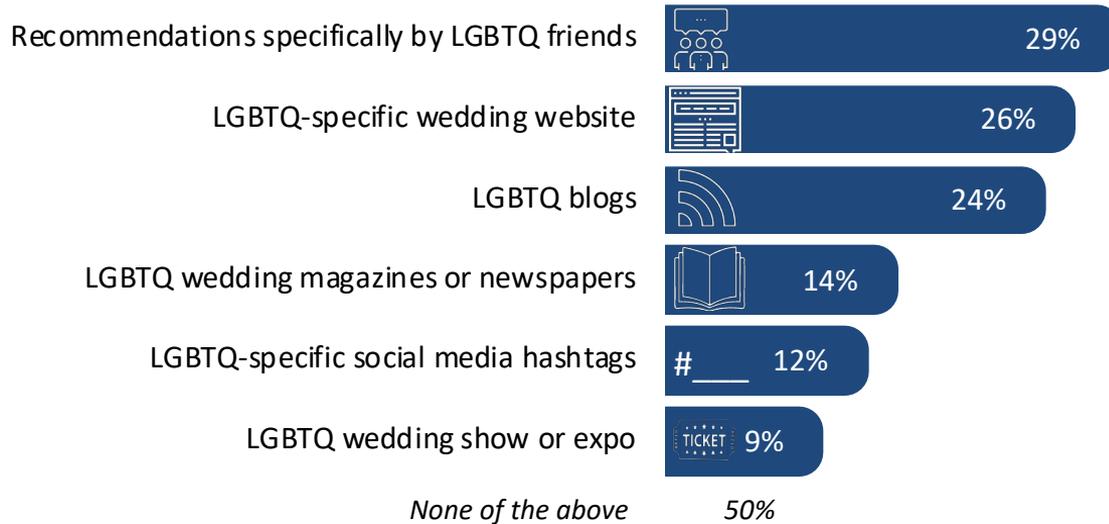
When researching wedding vendors, how important is it for you to see the following on a vendor's website, for you to consider doing business with the vendor? OK to leave blank if no vendors.



Base: Married or engaged participants who held/will hold ceremony and reception for invited guests n=482

Wedding Planning Resources: Half of couples used some type of LGBTQ-specific referral or media to assist with their wedding planning process.

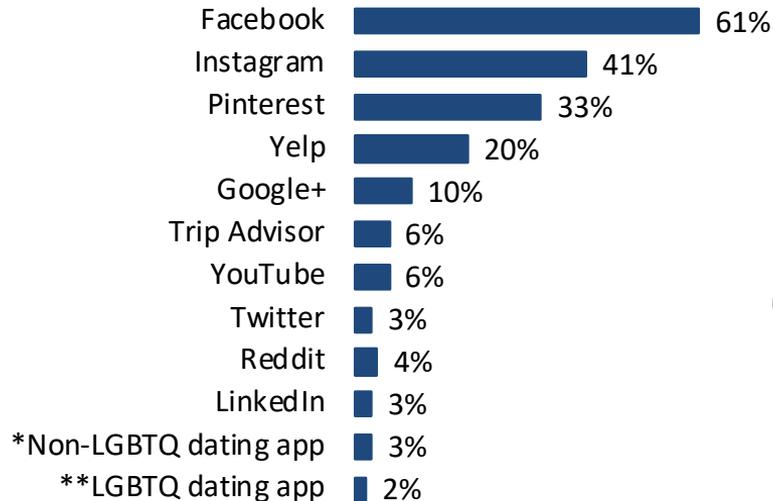
During your wedding planning process, did you use media and services that were specific for the LGBTQ community? (Please mark all that you used.)



Base: Married or engaged participants indicating wedding with invited guests and started planning process n=529

Social Media: For those using social media sources to find wedding vendors, Facebook, Instagram, and Pinterest were most important.

Which social media website or app have you used or will use to find the vendors to help with your wedding plans? (Please mark all that apply.)



None of the above 10% | Meetup, Tumblr and Snapchat received 0%



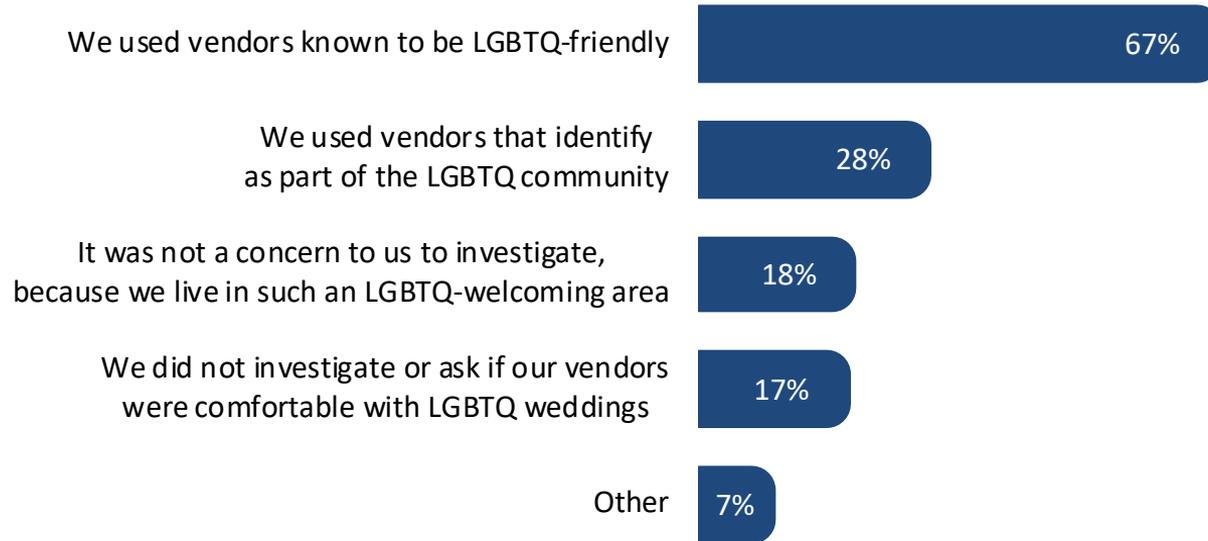
Base: Married or engaged participants using Social Media for planning n=104

*Dating app designed for general population (non-LGBTQ focused)

**Dating app designed for gay, lesbian, bisexual and/or transgender people

LGBTQ-identified vs. LGBTQ-friendly Vendors: LGBTQ couples chose mostly LGBTQ-friendly vendors and some LGBTQ-identified vendors. Relatively few did not try to identify if their vendors were supportive of LGBTQ couples.

During your wedding planning process, did you use vendors that were LGBTQ-identified, or known to be LGBTQ-friendly? (Please mark all that apply.)



Base: Married or engaged participants indicating wedding with invited guests and felt question was applicable to their situation n=473



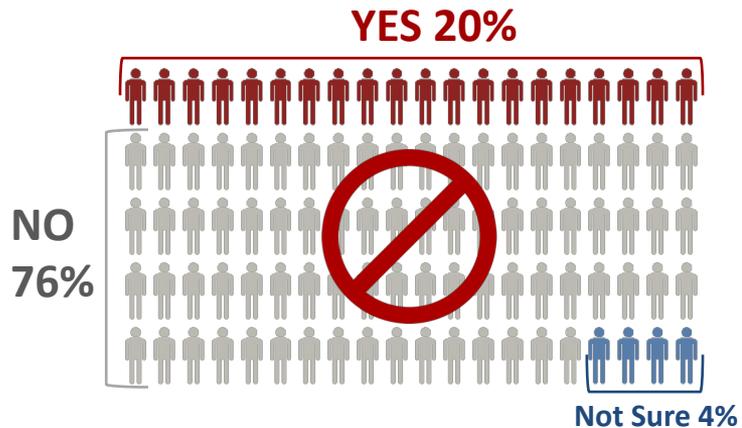
LGBTQ WEDDINGS IN 2018

Discrimination & Marriage Equality



Discrimination: 20% of participants reported some type of discrimination or negative experience during their wedding planning process. Please see the verbatim slides where the couples described their discrimination.

In your wedding planning, did you experience/have you experienced discrimination of any kind, or negative gender-normative or hetero-normative assumptions with vendors and/or government staff? This could include denial of services, failure to return phone calls/e-mails, assumptions about your gender roles, “bridal” language, etc.?

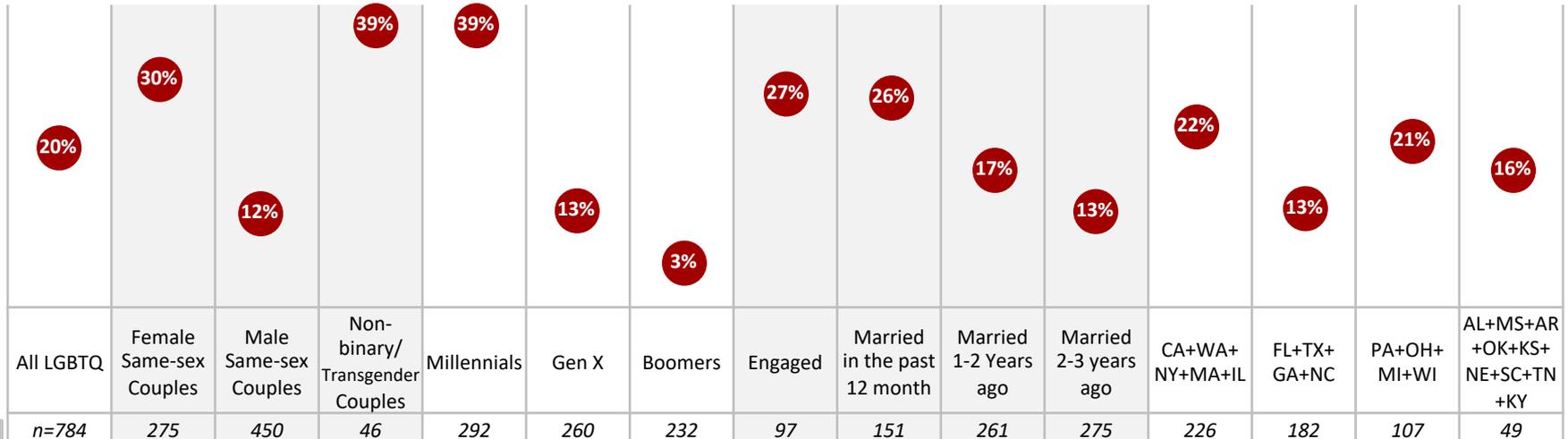


Base: Married or engaged participants to whom this question is applicable n=784

Discrimination: Of the 20% of participants who reported some type of discrimination or negative experience during their wedding planning process, female same-sex couples, non-binary couples, Millennials and those more recently married were most likely to make reports. Reports were also high in more liberal states. This graph is different than expectations and shows there is still much education and advocacy needed in the wedding industry.

In your wedding planning, did you experience/have you experienced discrimination of any kind, or negative gender-normative or hetero-normative assumptions with vendors and/or government staff? This could include denial of services, failure to return phone calls/e-mails, assumptions about your gender roles, “bridal” language, etc.?

Yes among



Base: Married or engaged participants to whom is question is applicable n=784

In Their Own Words: 5 Themes of Couples that Experienced Discrimination

1. Bridal language / Non-inclusive forms

“Our day-of coordinator left things like ‘bride & groom’ on our timeline spreadsheet and even said ‘Mr. & Mrs.’ during our actual rehearsal.”

“We frequently were told about the ‘bridal’ suite, vendors talked about the ‘bridal party,’ etc.”

“Phrases in the industry centered on a bride (which we don't have) Bridal Party, Bridal Show (vs. Wedding show). Spaces on vendor info forms for just bride and groom (often accompanied with, “well, I have to put one of you as the bride”). ”

“Several forms and contracts only had language that was ‘Bride/Groom’ or ‘Bridesmaids/Groomsmen.’ It was super awkward and required extra explanation every time. The government forms were welcoming and non-gendered (spouse 1, spouse 2).”

“I got my dress at a bridal shop. The forms you fill out in the beginning indicates ‘Groom.’ Well...there was no groom and the salesperson had no idea where to go from there.”

“In general, even when working with amazing vendors, all the default contracts and paperwork use ‘bride’ and ‘groom.’ We are very explicit about our queer relationship and that my partner identifies as non-binary, but this pops up OFTEN. I do not see it in vendors that are part of the LGBTQ community.”

“Most wedding merchandise for a couple (mugs, towels, etc.) was prepackaged as ‘Mr. & Mrs.’ with no option to customize genders.”

In Their Own Words: 5 Themes of Couples who Experienced Discrimination

2. Outright and Subtle Rejection

“Two photographers were obviously interested in our wedding until they realized we were lesbians; all of a sudden they had another wedding.”

“Our original photographer broke the contract when he learned I was marrying a woman. He suddenly got ‘a better offer’ that day. The tone in his voice was obvious.”

“Several vendors outright refused to work with us once we identified ourselves as a lesbian couple, and many, many more simply stopped returning our messages.”

“While investigating venues, we had entertained the idea of a destination -- and had reached out to a Caribbean resort. We were told they do not allow same-sex weddings because of local laws. We offered to get married in the US first, and asked if we could just have a wedding reception there and still qualify for the package (no local laws would apply). We were told no. If we wanted, we could show up and try to get a table at one of their restaurants, but they would not let us pre-arrange, use any of their wedding amenities, do room blocks, or get a free night as a married couple. The suggestion that we just show up and try to get a table was just offensive.”

“We would reach out to vendors and when we specified that there were two brides, we wouldn't get a response; this happened multiple times.”

“Two of the vendors I contacted were originally excited to assist with the wedding until I mentioned it was a same-gender couple. Then they both stopped returning calls and emails or had excuses for not following up.”

“We had some vendors refuse to provide quotes or responses.”

“We met with a caterer, but once they found out we were a same-sex couple, they never bothered to return our calls or emails, and avoided us.”

“We were never directly turned away for being same-sex interracial couple but when we got emails back that they were booked for our date, we would sometimes assume it was due to our relationship. We were very upfront in all inquiry emails that we were two women getting married.”

In Their Own Words: 5 Themes of Couples who Experienced Discrimination

3. Obvious Discomfort

“One of the cake vendors was very rude and dismissive of us. She made a comment asking which one of us is the bride? Luckily, the hotel had more than one cake vendor so we were able to take our business to a very friendly baker who listen to our requests and actually did a cake tasting with us. The first baker did not even offer us an opportunity to taste the cakes. I told the wedding planner from the hotel and she seemed very disappointed and surprised by our experience.”

“Our day-of wedding coordinator was changed half-way through the wedding process. Though she was professional in completing her duties, I could tell she was uncomfortable with our same-sex wedding.”

“We had a bakery be very cold and unwelcoming with us when we did a tasting with them. Nothing specific was said, but it was clear they were uncomfortable with us.”

“When they realized we were a gay couple, they were either being cold to us or overly enthusiastic; We really don’t need to hear about how you ‘love the gays’ or ‘have a gay cousin who is great.’”

“When I was trying on wedding dresses, the clerk asked about my husband to be. When I said my future wife, her mood changed, she stopped talking, and barely helped. My mom and sister had to help me try dresses on.”

“Our photographer at first seemed very liberal. However, on the day of the wedding it was clear she didn't know what to do with two women. She had very little patience with us and tried to get us to conform to what a hetero couple would normally do. We were both wearing dresses so it makes some of those traditional poses a bit harder or impossible. There was no effort to adjust on her part. She made us feel like a nuisance. And she left early. And she advertises that she pulls couples aside during the reception to get a couple more special photos. She didn't with us. It's unmistakable that we were treated differently than the heterosexual couples she works with.”

“Lots of questions and jokes made about my ‘husband,’ people assuming we were friends out shopping and arranging a wedding, totally missing that we were a couple.”

In Their Own Words: 5 Themes of Couples who Experienced Discrimination

4. Intake Assumptions

“Upon entering all vendor locations, no matter how friendly or welcoming they were, everyone automatically assumed we were the bride and her maid of honor, not the couple about to be wed. We had to correct everyone, everywhere we went.”

“Lots of assumed straight until otherwise noted. Everyone was great after being corrected, but I have a gender neutral name so via email everyone assumed I was a woman marrying my male fiancé.”

“We were ignored by vendors at a wedding show, and it was apparent that they were looking to speak with the bride.”

“Several times when booking wedding-related services (e.g. cake tasting, hotel room blocks, etc.), my ‘future husband’ was referenced. I had to correct people several times that I would be marrying my WIFE.”

“Surprisingly, the most negative experience we had was when we were shopping for our wedding dresses. We used a mainstream store and even after mentioning that we were marrying a woman, both of us (we shopped separately) experienced the stylist referring to the ‘man of your dreams’ and using very heteronormative language and assumptions.”

“Almost all vendors assumed there was a groom. When I visited vendors in person with my fiancé, many vendors spoke to my fiancé as the bride and asked questions about what her ‘groom’ would want. They assumed that I was only a friend there to provide support rather than also being one of the brides. We were routinely mistaken as friends rather than a couple. Everyone appeared to be accepting after we corrected them, but the hetero-normative assumptions were made even when we had made clear in initial emails/phone calls that this would be a same-sex wedding.”

In Their Own Words: 5 Themes of Couples who Experienced Discrimination

5. Gender Role Assumptions

“There were many times we were questioned about our outfits and who was going to wear the dress and who was going to wear the pants.”

“The officiant fumbled words and called us husband and wife.”

“It was very hard for our DJ and other vendors to remember that we are two BRIDES, and there isn't a groom.”

“When we arrived to meet one florist, she asked us, ‘which one of you is the actual bride?’ even though we had already left her a message saying we were a lesbian couple. We felt unwelcome, and did not hire her.”

“Even most of the LGBT friendly vendors we encountered were still very steeped in hetero-normative language and culture. The only ones who weren't, were part of the community themselves.”

“At the hotel, they provided champagne upon arrival. However, it said ‘To Mr. and Mrs.’ Not a big deal, but it was an easy error to avoid.”

“Assumptions made that one of us would wear a suit.”

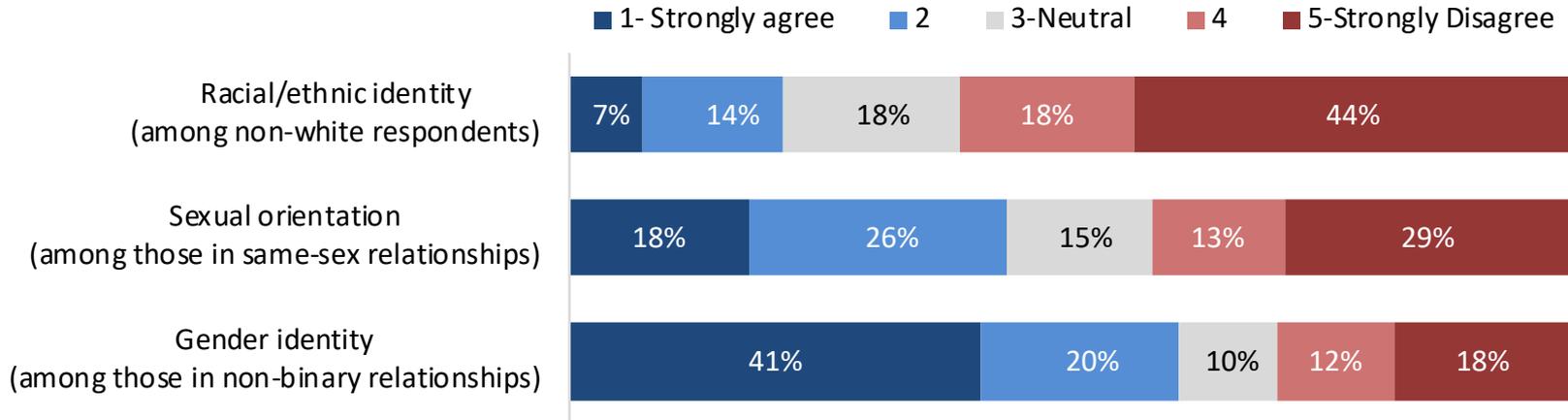
“The bridal shows were very disappointing and demoralizing. So much heteronormative crap out there left us feeling unwelcome and alienated.”

“Many vendors make comments about ‘the man’ not caring about the wedding details, or calling it ‘the bride’s special day.’ We work very hard in our relationship to have a partnership regarding decisions and choices. We do not fit into the stereotypes of an engaged couple. We are equally involved and responsible for making decisions. It is a very highly regarded value to us that we be seen as equals when it comes to our wedding.”

Concern of Rejection: There is strong fear (61%) among transgender and non-binary identified couples regarding rejections from wedding vendors. Fear also exists among same-sex couples (44%).

When planning your wedding, how much do you agree or disagree with the following statements regarding doing business with wedding vendors and/or government staff?

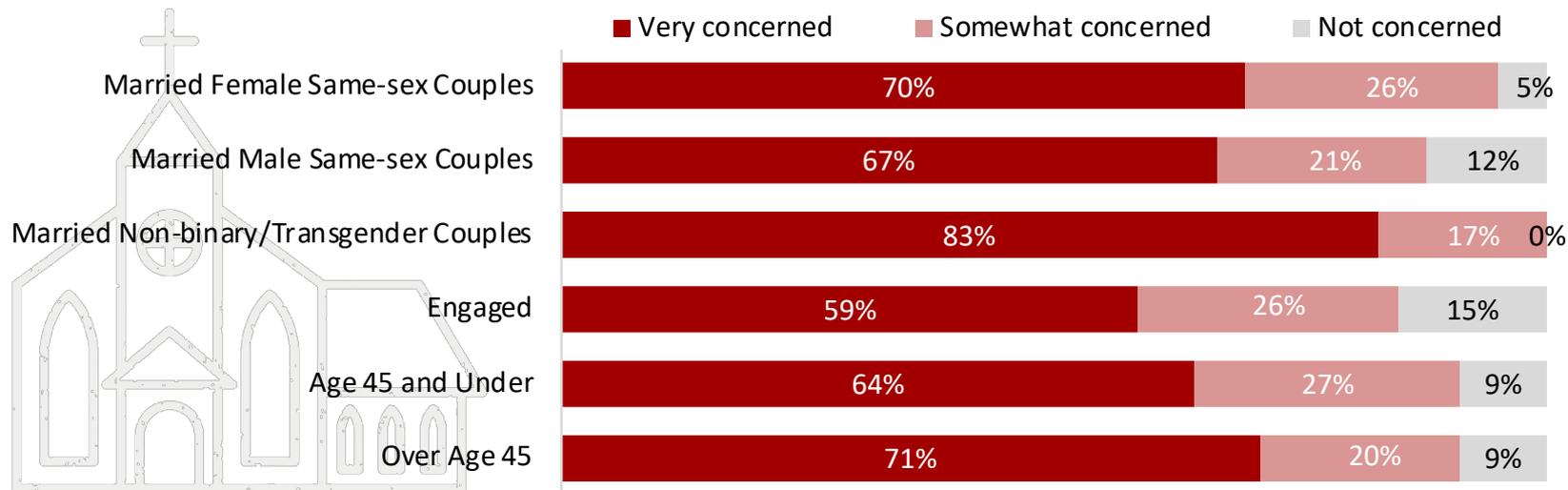
I was/am concerned about being rejected based on my/our...



Base: Married or engaged participants non-white n=108; those in same-sex relationships n=737; those in non-binary relationships n=51

Concerns About “Religious Freedom” Laws in USA: There is wide concern among the entire LGBTQ community about religious freedom laws.

How concerned are you about "religious freedom laws" that allow individuals or companies to not provide services to same-sex couples for their weddings?



Base: Married Female Same-sex Couples n=233; Married Male Same-sex Couples n=409; Married Non-binary/Transgender Couples n= 35; Engaged n=121
Weighted Age 45 and Under n=430; Weighted Over Age 45 n=378

Concerns About the Right to Marry in USA: There is also wide concern within the LGBTQ community that there could be successful legal challenges, reversing the right of same-sex couples to marry in the United States.

How concerned are you that there will be a successful legal challenge reversing the right of same-sex couples to marry in the United States?



Married Female Same-sex Couples

Married Male Same-sex Couples

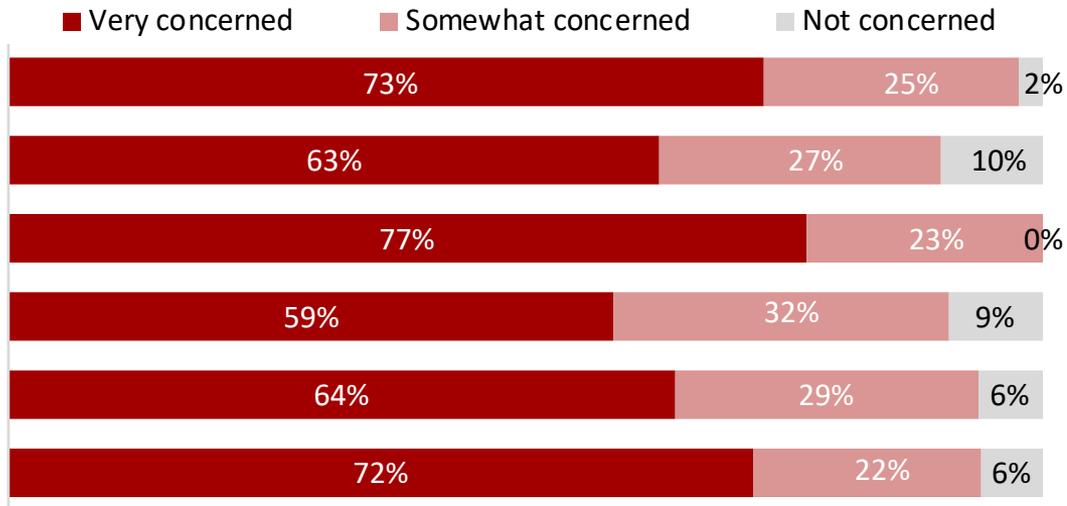
Married Non-binary/Transgender Couples



Engaged

Weighted Age 45 and Under

Weighted Over Age 45



Base: Married Female Same-sex Couples n=233; Married Male Same-sex Couples n=409; Married Non-binary/Transgender Couples n= 35; Engaged n=121
 Weighted Age 45 and Under n=430; Weighted Over Age 45 n=378

Concerns About Marriage Equality in USA: Only about half of LGBTQ couples are confident that marriage equality will remain in all 50 states five years from now. The other half mostly feel that we will return to that situation where same-sex couples can be married in some states and not others.

With the current political environment in the United States, where do you think marriage equality will stand five years from now? (Please mark the most likely outcome, in your opinion.)

	No change, same-sex marriage will remain legal in all 50 states, and recognized by the federal government.	Same-sex marriage will be legal in some states, not in others, but recognized by the federal government.	Same-sex marriage will be legal in some states, not in others, and not recognized by the federal government.	Same-sex marriage will be not be legal in the United States.
Married Female Same-sex Couples	46%	28%	24%	1%
Married Male Same-sex Couples	57%	22%	18%	2%
Married Non-binary/Transgender Couples	43%	23%	29%	6%
Engaged	55%	26%	16%	3%
Weighted Age 45 and Under	56%	24%	18%	2%
Weighted Over Age 45	49%	26%	22%	4%

Base: Married Female Same-sex Couples n=233; Married Male Same-sex Couples n=409; Married Non-binary/Transgender Couples n= 35; Engaged n=121
Weighted Age 45 and Under n=430; Weighted Over Age 45 n=378

FOR MORE INFORMATION:

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LGBTQ Research Panel 2018

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with 25 years of dedicated experience conducting LGBTQ consumer surveys, focus groups, in-depth interviews, advisory boards, consulting services and training. We skillfully assist our clients with strategies, tactics and cost-effective plans based on research results and case study experience.

CMI's PANEL CONSISTS OF OVER 90,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



70,000
LGBTQ Panelists
in the USA



9,000
LGBTQ Panelists
in Canada
(English + French Speaking)



4,500
LGBTQ Panelists
in China



Capabilities in the
UK, Germany,
Australia, Mexico
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



5,000
Transgender
community
members



10,000
Bisexual
community
members



7,500 With an HHI
Over \$150,000



7,500 With an HHI
Below \$25,000



- Participants in all 50 states
- Zip code-level geographic targeting capability

Thousands of men living with HIV

Note: All health-related data is maintained independent of personally identifying information.



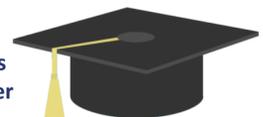
25,000
Representing
the LGBTQ
community
of color



25,000
LGBTQ
Millennials



12,000
With a master's
degree or higher



5,000
LGBTQ parents with
a child under 18
living at home



15,000
Legally married
same-sex couples



LGBTQ youth research
experience
(in partnership with an
institution and IRB approval)



LGBTQ Research and Corporate Training

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

 TARGET	 Better Homes and Gardens REAL ESTATE	 WNBA	 Hallmark Cards	 DIRECTV	 WELLS FARGO
 GILEAD	 Johnson & Johnson	 HOLOGIC® The Science of Sure	 RADIESSE® A NATURAL LOOK THAT LASTS	 OraSure Technologies	 aetna®
 NEW YORK LIFE	 esurance® an Allstate company	 Florida Blue In the pursuit of health	 iHeart MEDIA	 VIACOM®	 DigitasLBi
 MillerCoors® A MOLSON COORS COMPANY	 ABSOLUT® Country of Sweden VODKA	 E. & J. Gallo Winery	 BRIDGESTONE	 JONES LANG LASALLE®	 TELUS
 CIRQUE DU SOLEIL	 travelocity®	 Argentina	 JNTO Japan National Tourism Organization	 JAL	 HAWAIIAN AIRLINES.
 Marriott starwood Hotels and Resorts	 HYATT	 KIMPTON® HOTELS & RESTAURANTS	 HAWAII TOURISM AUTHORITY	 VISITFLORIDA.	 LAS Vegas CONVENTION AND VISITORS AUTHORITY
 Penn UNIVERSITY OF PENNSYLVANIA	 JOHNS HOPKINS UNIVERSITY	 CU NY THE CITY UNIVERSITY OF NEW YORK	 Planned Parenthood® Act. No matter what.	 American Cancer Society®	 NORTHSTAR MEMORIAL GROUP Care, Comfort and Plan
 AARP® Real Possibilities	 United States Census Bureau	 Freddie Mac We make home possible®	 CDC CENTERS FOR DISEASE CONTROL AND PREVENTION	 U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT	 FDA
 nielsen	 qualtrics.	 Ipsos	 GfK	 ICF INTERNATIONAL	 C+R RESEARCH

LGBTQ Market Research:

There is a difference!

LGBTQ research is meant to help marketers understand the LGBTQ community and make educated decisions about strategies and tactics to reach them.

Community Marketing & Insights (CMI) leverages our own proprietary panel to generate the valid data that our clients depend on. As an LGBTQ-founded and operated company, we understand the LGBTQ community's unique life experience. And because we have been serving clients for over two decades and have already conducted over 300 LGBTQ-specific research projects, we have the professional experience needed to deliver actionable results and recommendations.

CMI'S PROPRIETARY PANEL

Community Marketing & Insights (CMI) has recruited for our proprietary research panel over the past 25 years by partnering with over 300 LGBTQ media, organizations, events, social media and influencers throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is highly representative of LGBTQ consumers who interact with LGBTQ community organizations and media. Our panelists come from diverse sources, allowing for broad research projects or targeted segments within LGBTQ.

CMI research is trusted by—and frequently quoted in—*New York Times*, *USA Today*, *Wall Street Journal*, *Forbes*, *Newsweek*, *U.S. News & World Report*, *Los Angeles Times*, *Chicago Tribune*, *Miami Herald*, *Ad Week*, *Christian Science Monitor*, NPR, CBS News, CNN, eMarketer, Mashable, Reuters, Associated Press and many others. CMI's research is considered the definitive resource for insights into the LGBTQ community.

LGBTQ PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO "LGBTQ MARKET"

Community Marketing & Insights emphasizes that there is no "gay market," just as there is no single "Asian market." The LGBTQ 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 LGBTQ will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBTQ will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

Note: General market surveys that may include a very small subset of "LGBT responses" just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.

CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS

CMI has conducted hundreds of LGBTQ-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 90,000 qualified and active LGBTQ consumers—the largest of its kind, by far. Our Annual LGBTQ 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.

Note: Without access to this enormous resource of qualified LGBTQ 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 LGBTQ (see below) through a small sample. CMI fields surveys of 1,000+ responses. You might see some research with small samples, but they lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make an assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Miami? Generalities and sweeping statements about "the LGBTQ market" based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.

GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBTQ 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 LGBTQ-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.

Note: 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 research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

Note: 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 LGBTQ 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 LGBTQ market intelligence, however, and the cumulative 60+ years of LGBTQ-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 25+ years.

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBTQ-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 LGBTQ-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBTQ-Owned Business Enterprise.

CMI is involved in the LGBTQ 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 LGBT 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.