LGBT is a market segment that simply shouldn’t be ignored. The social and political landscape is evolving rapidly, and developing a clear, actionable understanding of this dynamic and influential demographic has never been more important for your brand.

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

CMI has been a leader in LGBT marketing and insights since 1992, and my team looks forward to being your strategic partners.

Thomas Roth, President
Community Marketing, Inc.
www.CommunityMarketingInc.com
CMI’s 6th Annual LGBT Community Survey

Thanks to our 2012 Sponsors & Partners
In partnership with Rivendell Media, CMI’s 2012 LGBT Community Survey respondents were referred from 150+ global LGBT media partners, events and organizations

- 103.9 PROUD FM
- Adelante Magazine
- Advocate.com
- Affirmations
- afterellen.com
- afterlton.com
- AMERICABlog
- Aqua Foundation for Women
- B Magazine
- Baltimore OUTloud
- BARtab
- Bay Area Reporter
- Bay Times
- Bay Windows
- BBCM Foundation
- Bey-Clarke Media Group
- Bisexual Resource Center
- Ble Magazine
- Boycult
- Brunos.de
- Camp Magazine
- CenterLink: The Community of LGBT Centers
- Central Voice Newspaper
- ChicagoPride.com
- Clubsanook.com
- Community Marketing, Inc.
- Compete Magazine
- CUE MAGAZINE INC
- Curve Magazine
- Dallas Voice
- Damron Gay Travel Guides
- David Magazine
- De Magneet
- Delta Foundation of Pittsburgh
- DesiBoys
- Downlink.com
- Echelon Magazine
- EDGE Media Network (edgeatlan, edgeLosAngeles, etc.)
- Equally Wed
- Erie Gay News
- Fab Magazine
- fabmagazine.com
- FENUXE Magazine
- FlawLes Media
- Frontiers Magazine
- GA Voice
- Gay Ad Network
- Gay Calgary Magazine
- Gay City News
- Gay to Z Directory
- Gay.com
- Gay.net
- Gayborhood
- GayCities
- Gaynewnetwork.com.au
- Gaypedia
- Gayromeo.com
- GayWhistler
- Gayyellow.com
- GLCCB/Gay Life
- Grab Magazine
- Greg in Hollywood
- Grindr
- GuideMag.com
- Hello Media
- Hotspots Magazine
- Hunk du jour
- Instinct Magazine
- International Federation of Black Prides, Inc.
- InterPride
- ION Arizona Magazine
- Just Circuit Magazine
- Just Out Newspaper
- Kenneth in the 212
- LA PRIDE/Christopher St. West
- Lesbian Mom Today
- Lesbian News (LN)
- Lesbian.com
- LGBT Community Center (NYC)
- LGBT Weekly
- Logotv.com
- Männler
- Metro Weekly
- Metrosource Magazine
- New Mexico GLBTQ Centers
- NewNowNext.com
- Next Door Magazine
- NEXT Magazine
- noiZe Magazine
- OMG Blog
- OneGoodLove
- Our Lives Magazine
- Out & About Newspaper
- Out Front Colorado
- Out In Jersey, Inc.
- Out.com
- OutServe
- OutSmart Magazine
- Outwords, Inc.
- Pink Banana Media
- Pink Pages
- Pittsburgh's Out / outonline.com
- Pride Card, The
- Pride Source Media Group
- PurpleDrag.com
- Q-Notes (Pride Publishing & Typesetting)
- Queer.de
- Queerid
- Queerty, Inc.
- Rage Monthly, The
- Rainbow Times, The
- Rainbow.travel
- San Diego Gay & Lesbian News
- San Diego PIX Magazine
- SheWired.com
- SoCal Social Club
- Social House Media Group
- Spartacus Traveler
- Spartacusworld.com
- SquareHippies
- Squrt.org
- Staten Island LGBT Community Center
- Stonewall Columbus / Columbus Pride
- Sweet
- TAG / TAG Approved Accommodations
- Telluride Gay Ski Week
- The New Civil Rights Movement
- TLA Entertainment
- Tom on Tour
- Towleroad
- Travel Gay Canada
- Triangle Black Pride
- Unicorn Booty
- Utopia-Asia.com
- Washington Blade
- Watermark Media, Inc.
- Windy City Times
- Wisconsin Gazette
- Women's eNews
- Xtra! Ottawa
- Xtra! Toronto
- Xtra! Vancouver
- xtra.ca
Special thanks to some of our most productive community partners...

- Grindr
- Curve
- Towleroad and AskTell Media
- Logo, afterelton.com, afterellen.com
- Here Media (OUT, Advocate, gay.com, gay.net, shewired)
- TLA Entertainment
- Instinct
- Queerty
- GayCities
- Squirt
- Damron
- Bisexual Resource Center
- Chicago Pride
- Los Angeles Pride
- Unicorn Booty
- Queer.de
- Xtra! Canada
- GayNewsNetwork.com.au
About

Community Marketing, Inc.

LGBT Market Research + Development Lab®

• The Community Marketing, Inc. (CMI) LGBT Market Research + Development Lab® has been conducting LGBT consumer research since 1994. Our practice includes online surveys, telephone interviews, intercepts, focus groups (on-site and online), and advisory boards in North America and Europe. Industry leaders around the world depend on CMI’s research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.


• CMI’s research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: Wells Fargo Bank, Target Brands, ABSOLUT Vodka, MetLife, United States Census Bureau, Travelocity, American Cancer Society, Gallo Wineries, Kaiser Family Foundation, Hyatt Hotels, Japan National Tourism Organization and numerous other corporations and organizations across North America and around the world.
Our 6th Annual LGBT Community Survey continues to be one of the most comprehensive studies available focusing on LGBT consumers

Who Did We Talk To?

- Over **45,000** total respondents living in 148 countries. The survey was available in English and German (with additional languages to be added in 2013).
- This report focuses on U.S. data for over 11,000 self-identified gay men and about 2,000 lesbian women.
- Respondents were recruited from CMI’s proprietary research panel and 200+ LGBT media outlets, events and partner organizations.
- Comparisons to CMI’s 2011 LGBT Community Survey data are made where applicable.
- CMI also fielded a condensed survey to a nationally representative sample of US consumers in June 2012; comparisons are displayed where applicable to provide additional context to the LGBT results.

How Did We Talk To Them?

- 15 minute online survey conducted in May - June 2012.
- Our mobile-optimized survey was made available through an email invitation to CMI’s research panelists, as well via the publications, websites, email lists, instant messaging, mobile pop-ups, social media and community events of this year’s 150+ partners.
- Importantly, our sample reflects the readership/membership/involvement of this broad range of LGBT focused media outlets, organizations and events. This means that the results summarized here are highly representative of LGBT consumers who are interacting with LGBT community media and events; i.e. the audience reached by “LGBT marketing.”
In This Overview...
Key Topics

- Technology & Lifestyle
- Brand Attitudes & Purchase Behaviors
- LGBT Marketing & Messaging
- Media Usage & Interaction With Advertising
- Politics & Fundraising
How are gay men and lesbians interacting with technology?
**Technology Ownership**

- Gay men and lesbians are avid tech users and are more likely to own a variety of devices – especially iPhones and iPads – compared to their straight counterparts.

### Which of the following do you own?

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Gay Men</th>
<th>Lesbians</th>
<th>Total LGBT Index vs. Nat’l Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital camera</td>
<td></td>
<td></td>
<td>112</td>
</tr>
<tr>
<td>iPhone</td>
<td></td>
<td></td>
<td>174</td>
</tr>
<tr>
<td>Android smartphone</td>
<td></td>
<td></td>
<td>134</td>
</tr>
<tr>
<td>iPad</td>
<td></td>
<td></td>
<td>161</td>
</tr>
<tr>
<td>E-reader (Nook, Kindle, Sony, etc.)</td>
<td></td>
<td></td>
<td>106</td>
</tr>
<tr>
<td>Digital camcorder (Flip, HD, etc.)</td>
<td></td>
<td></td>
<td>75</td>
</tr>
<tr>
<td>iPod Touch</td>
<td></td>
<td></td>
<td>106</td>
</tr>
<tr>
<td>Blackberry smartphone</td>
<td></td>
<td></td>
<td>67</td>
</tr>
<tr>
<td>Other WiFi / HotSpot enabled device</td>
<td></td>
<td></td>
<td>130</td>
</tr>
<tr>
<td>Android tablet</td>
<td></td>
<td></td>
<td>57</td>
</tr>
<tr>
<td>Windows smartphone</td>
<td></td>
<td></td>
<td>85</td>
</tr>
</tbody>
</table>

*Base: Gay Men n=10,963; Lesbians n=1,976*
## Technology & Lifestyle

- LGBT’s – especially gay men – are more likely to say they rely on technology to help manage their hectic lifestyles.
- And, gay men (especially 18-29’s) are early adopters of new tech products within their networks.

### Attitudes About Technology & Lifestyle

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I carry my cell phone or PDA everywhere I go</td>
<td>79%</td>
<td>184</td>
<td>79%</td>
<td>132</td>
</tr>
<tr>
<td>Technology helps make my life more organized</td>
<td>59%</td>
<td>144</td>
<td>58%</td>
<td>109</td>
</tr>
<tr>
<td>It is important to juggle various tasks at the same time</td>
<td>50%</td>
<td>152</td>
<td>47%</td>
<td>122</td>
</tr>
<tr>
<td>I am so busy, often I can’t finish everything I need to in a day</td>
<td>33%</td>
<td>193</td>
<td>35%</td>
<td>131</td>
</tr>
<tr>
<td>I’m among first of my friends to try new technology products</td>
<td>27%</td>
<td>133</td>
<td>18%</td>
<td>73</td>
</tr>
</tbody>
</table>

Especially true for younger gay men, age 18-29
What they are buying and what influences them?

Brand Attitudes & Purchase Behaviors
Brand Attitudes

- LGBTs are motivated more by trust and quality over brand names, and they’re willing to pay more for it.
- And for brands that get it right, LGBTs are much more likely to become advocates and share with their friends.

### Attitudes About Brands & Shopping

<table>
<thead>
<tr>
<th>Statement</th>
<th>Gay Men (%)</th>
<th>Index vs. Nat’l Avg., Men</th>
<th>Lesbians (%)</th>
<th>Index vs. Nat’l Avg., Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>If a company or brand impresses me, I will make a point of telling friends about it</td>
<td>64%</td>
<td>139</td>
<td>65%</td>
<td>132</td>
</tr>
<tr>
<td>I’ll pay more for a product made by a company I trust</td>
<td>62%</td>
<td>154</td>
<td>58%</td>
<td>129</td>
</tr>
<tr>
<td>Price is more important to me than brand names</td>
<td>32%</td>
<td>107</td>
<td>30%</td>
<td>75</td>
</tr>
<tr>
<td>It is generally worth paying extra for top-of-line or cutting edge</td>
<td>26%</td>
<td>126</td>
<td>18%</td>
<td>98</td>
</tr>
<tr>
<td>Brand name is the best indication of quality</td>
<td>15%</td>
<td>57</td>
<td>8%</td>
<td>49</td>
</tr>
<tr>
<td>I am influenced by what's hot and what's not</td>
<td>15%</td>
<td>135</td>
<td>7%</td>
<td>51</td>
</tr>
</tbody>
</table>

Base: Gay Men n=10,963; Lesbians n=1,976
Past Year Purchases

- Gay men and lesbians continue to lead the way on the technology front, increasing purchases of smartphones and tablets vs. last year. Interestingly, laptop purchases are down slightly, suggesting a potential substitution effect.

Top Purchases, Past Year

arrows indicate notable shifts vs. 2011

<table>
<thead>
<tr>
<th></th>
<th>Gay Men</th>
<th>Lesbians</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Phone</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Major Vacation</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>HDTV</td>
<td>22%</td>
<td>21%</td>
</tr>
<tr>
<td>Furniture</td>
<td>23%</td>
<td>22%</td>
</tr>
<tr>
<td>Laptop</td>
<td>-4%</td>
<td>-5%</td>
</tr>
<tr>
<td>Car</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Tablet</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Base: 2012 Gay Men n=10,963; Lesbians n=1,976  Base: 2011 Gay Men n=10,019; Lesbians n=3,427
Average Spend – New Clothing

- Gay men and lesbians spend more on new clothing than the average for men and women nationally; the highest-spending segment is gay men age 30-44 (58% spent $500 or more)

About how much have you spent on new clothes in the past 12 months?

- $500 or more

- 54% Index vs. Nat’l Avg., Men
- 135

- 47% Index vs. Nat’l Avg., Women
- 121

Base: Gay Men n=10,963; Lesbians n=1,976; U.S. Gen Pop Males n=150; Females n=150
Self Improvement Products & Services

- Gay men and lesbians show a strong interest in self improvement products.
- Age plays a bigger role than gender in the type of self improvement products purchased.

<table>
<thead>
<tr>
<th>Top 10 Self Improvement Products or Services</th>
<th>Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamins</td>
<td>56%</td>
</tr>
<tr>
<td>Gym membership</td>
<td>49%</td>
</tr>
<tr>
<td>Spa treatments / massages</td>
<td>26%</td>
</tr>
<tr>
<td>Paid educational classes of any kind</td>
<td>40%</td>
</tr>
<tr>
<td>Paid therapy or counseling</td>
<td>12%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>15%</td>
</tr>
<tr>
<td>Paid online dating service</td>
<td>12%</td>
</tr>
<tr>
<td>Personal trainer</td>
<td>9%</td>
</tr>
<tr>
<td>Yoga studio classes (outside of gym)</td>
<td>9%</td>
</tr>
<tr>
<td>Paid weight management program</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: Gay Men 18-29 n=2,260, 30-44, n=3541 45-59 n=4,802; Lesbians 18-29 n=354, 30-44 n=688, 45-59 n=935
Self Improvement Products & Services

- LGBTs over index vs. the national average across a wide range of self improvement products and services, especially personal training, paid therapy and spa treatments

Top 10 Self Improvement Products or Services

<table>
<thead>
<tr>
<th>Product</th>
<th>LGBT %</th>
<th>% Nat'l Avg.</th>
<th>Total LGBT Index vs. Nat'l Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamins</td>
<td>54%</td>
<td>69%</td>
<td>127</td>
</tr>
<tr>
<td>Gym membership</td>
<td>24%</td>
<td>38%</td>
<td>158</td>
</tr>
<tr>
<td>Spa treatments / massages</td>
<td>17%</td>
<td>35%</td>
<td>204</td>
</tr>
<tr>
<td>Paid educational classes of any kind</td>
<td>14%</td>
<td>27%</td>
<td>195</td>
</tr>
<tr>
<td>Paid therapy or counseling</td>
<td>6%</td>
<td>16%</td>
<td>263</td>
</tr>
<tr>
<td>Bicycle</td>
<td>13%</td>
<td>18%</td>
<td>69</td>
</tr>
<tr>
<td>Paid online dating service</td>
<td>4%</td>
<td>11%</td>
<td>275</td>
</tr>
<tr>
<td>Personal trainer</td>
<td>3%</td>
<td>10%</td>
<td>320</td>
</tr>
<tr>
<td>Yoga studio classes (outside of gym)</td>
<td>9%</td>
<td>7%</td>
<td>133</td>
</tr>
<tr>
<td>Paid weight management program</td>
<td>4%</td>
<td>7%</td>
<td>168</td>
</tr>
</tbody>
</table>

Base: Total LGBT n=19,555; Nat’l n=300
Tobacco Use

• 27% of gay men indicate smoking at least sometimes and 23% of lesbians smoke sometimes.
• In comparison, the U. S. CDC estimates that 22% of US adult men and 17% of US adult women smoke every day or some days.

Do You Use Tobacco Products?

Gay Men

- NO: 73%
- SOMETIMES: 9%
- YES: 18%

Lesbians

- NO: 77%
- SOMETIMES: 9%
- YES: 14%

Base: Gay Men n=10,963; Lesbians n=1,976
Alcohol Consumption

- Gay men – especially 18-29’s – tend to drink more spirits compared to other alcohol types.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer</td>
<td>4.8</td>
<td>4.4</td>
<td>3.0</td>
<td>3.5</td>
<td>3.2</td>
<td>2.6</td>
</tr>
<tr>
<td>Wine</td>
<td>2.4</td>
<td>2.9</td>
<td>3.2</td>
<td>1.7</td>
<td>2.0</td>
<td>2.4</td>
</tr>
<tr>
<td>Sparkling Wine/Champagne</td>
<td>0.8</td>
<td>0.8</td>
<td>0.5</td>
<td>1.0</td>
<td>0.5</td>
<td>0.4</td>
</tr>
<tr>
<td>Spirits/Cocktails</td>
<td><strong>5.9</strong></td>
<td><strong>5.0</strong></td>
<td>3.9</td>
<td>3.4</td>
<td>2.4</td>
<td>2.4</td>
</tr>
</tbody>
</table>

Base: Gay Men 18-29 n=2,260, 30-44, n=3541 45-59 n=4,802; Lesbians 18-29 n=354, 30-44 n=688, 45-59 n=935
Alcohol Consumption

- Gay men drink much less beer and drink more spirits and cocktails compared to men nationally.
- Lesbians’ alcohol consumption is comparable to the national average for all women.

<table>
<thead>
<tr>
<th></th>
<th>Gay Men</th>
<th>Nat’l Avg., Men</th>
<th>Lesbians</th>
<th>Nat’l Avg., Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer</td>
<td>3.9</td>
<td>9.1</td>
<td>3.0</td>
<td>2.6</td>
</tr>
<tr>
<td>Wine</td>
<td>2.9</td>
<td>2.3</td>
<td>2.1</td>
<td>1.7</td>
</tr>
<tr>
<td>Sparkling Wine/Champagne</td>
<td>0.7</td>
<td>1.1</td>
<td>0.5</td>
<td>0.7</td>
</tr>
<tr>
<td>Spirits/Cocktails</td>
<td>4.7</td>
<td>3.3</td>
<td>2.5</td>
<td>2.5</td>
</tr>
</tbody>
</table>

Averages shown are estimates calculated from scaled survey data with a maximum of 25 drinks factored.

Base: Gay Men n=10,963; Lesbians n=1,976; U.S. Gen Pop Males n=150; Females n=150
LGBT Marketing & Messaging

Brand & Purchase Impact

Community Marketing, Inc.

LGBT Market Research + Development Lab®
Response to LGBT Terms in Corporate Marketing

- ‘LGBT’ and ‘Gay & Lesbian’ are the most preferred terms used in corporate marketing
- Popularity of ‘GLBT’ has decreased significantly over the past few years

How you feel about each term when you see it used by a corporation?

(%) Favorable

- LGBT: 87%
- Gay Men: 71%
- Gay & Lesbian: 76%
- Gay-friendly: 69%
- GLBT: 60%
- Lesbian & Gay: 58%
- Rainbow (the image/graphic): 74%
- Gay-welcoming: 65%
- Everyone-welcoming: 65%
- LGBTQ: 58%
- Straight ally: 42%
- "Rainbow" (the word): 43%
- Queer: 30%
- LGBTQQIA: 9%

Base: 2012 Gay Men n=10,963; Lesbians n=1,976
Influence on Purchase Decisions

- Companies advertising in the LGBT media and sponsoring LGBT charities favorably influences 70% to 80% of LGBT consumers

When a company advertises in LGBT media or sponsors LGBT charities, has it influenced your purchasing decisions?

*Past 12 Months*

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Advertises in LGBT media</th>
<th>Sponsors LGBT charities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gay Men 18-29</td>
<td>30% 43%</td>
<td>38% 35%</td>
</tr>
<tr>
<td>Gay Men 30-44</td>
<td>31% 47%</td>
<td>41% 40%</td>
</tr>
<tr>
<td>Gay Men 45-59</td>
<td>31% 51%</td>
<td>39% 43%</td>
</tr>
<tr>
<td>Lesbian 18-29</td>
<td>36% 44%</td>
<td>45% 35%</td>
</tr>
<tr>
<td>Lesbian 30-44</td>
<td>38% 48%</td>
<td>48% 40%</td>
</tr>
<tr>
<td>Lesbian 45-59</td>
<td>41% 43%</td>
<td>50% 35%</td>
</tr>
</tbody>
</table>

Base: Gay Men 18-29 n=2,260, 30-44, n=3541 45-59 n=4,802; Lesbians 18-29 n=354, 30-44 n=688, 45-59 n=935
Influence on Specific Category Purchase Decisions

- Corporate LGBT outreach has a large impact on purchase decisions for gay men for travel-related purchases such as hotels and vacations. Clothing, chain restaurants and personal care items also stand out.

**In my purchasing decisions, a company's LGBT outreach influence was...**

*Among those who say they are strongly influenced*

- **Vacations cruises / tours**: 39%
- **Hotel room booking**: 37%
- **National chain restaurant**: 32%
- **Personal care (pain relief, lubricants, etc.)**: 32%
- **Airline ticket purchase**: 29%
- **Clothing brand purchase**: 28%
- **Vodka brand purchase**: 27%
- **Fast food restaurant**: 25%
- **My bank selection**: 20%
- **Insurance services**: 20%
- **Beer brand purchase**: 19%
- **Smart phone purchase**: 19%
- **Automobile purchase**: 17%

**Base: 2012 Gay Men n=10,963**
Influence on Specific Category Purchase Decisions

• Among lesbians, corporate LGBT outreach impacts categories such as insurance, cars and beer more than gay men; interestingly other categories such as travel and personal care items are impacted much less compared to gay men.

In my purchasing decisions, a company's LGBT outreach influence was...

Among those who say they are strongly influenced

Base: 2012 Lesbians n=1,976
Brands Supported For Pro-LGBT Policies

- JCPenney’s partnership with Ellen DeGeneres, as well as recent LGBT Mother’s Day and Father’s Day ads, has translated into strong support among gay men and lesbians; Starbucks and Target round out the top 3 brands among both groups.

Which companies or brands have you made a conscious decision to purchase from because of their pro-LGBT policies or practices?

Past Year (OPEN-END VERBATIM WRITE-IN RESPONSES)

<table>
<thead>
<tr>
<th>Among Gay Men</th>
<th>Among Lesbians</th>
</tr>
</thead>
<tbody>
<tr>
<td>jcp</td>
<td>34%</td>
</tr>
<tr>
<td>Starbucks</td>
<td>16%</td>
</tr>
<tr>
<td>Target</td>
<td>15%</td>
</tr>
<tr>
<td>Absolut Vodka</td>
<td>14%</td>
</tr>
<tr>
<td>Apple</td>
<td>12%</td>
</tr>
<tr>
<td>Macy's</td>
<td>10%</td>
</tr>
<tr>
<td>American Airlines</td>
<td>7%</td>
</tr>
<tr>
<td>Wells Fargo</td>
<td>7%</td>
</tr>
<tr>
<td>Bud Light</td>
<td>6%</td>
</tr>
<tr>
<td>GAP</td>
<td>6%</td>
</tr>
<tr>
<td>Lenovo</td>
<td>4%</td>
</tr>
</tbody>
</table>

Note that the survey was fielded just as the JCPenny campaigns were launched, which may have influenced the favorability ranking.

Base: 2012 Gay Men n=10,963; Lesbians n=1,976
How do you reach them most effectively?
Interaction with Advertising

- Facebook advertising response has now overtaken traditional banner ads among most gay and lesbian age groups.
- Mobile app advertising is particularly effective among gay men 18-29.

In the past week, have you...?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Gay Men 18-29</th>
<th>Gay Men 30-44</th>
<th>Gay Men 45-59</th>
<th>Lesbians 18-29</th>
<th>Lesbians 30-44</th>
<th>Lesbians 45-59</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicked on a Facebook ad</td>
<td>28%</td>
<td>27%</td>
<td>22%</td>
<td>23%</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Clicked on a website banner ad</td>
<td>21%</td>
<td>24%</td>
<td>26%</td>
<td>24%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Scanned a QR &quot;tag&quot; with your smartphone</td>
<td>19%</td>
<td>19%</td>
<td>13%</td>
<td>9%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Clicked on a mobile app ad</td>
<td></td>
<td></td>
<td>25%</td>
<td></td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Forwarded an advertisement to a friend</td>
<td>10%</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>18%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: Gay Men 18-29 n=2,260, 30-44, n=3541 45-59 n=4,802; Lesbians 18-29 n=354, 30-44 n=688, 45-59 n=935
Media Consumption

- The LGBT audience’s media consumption habits between mainstream and LGBT media are complex, and communications through both are important.
- Significant generational differences exist in viewing print media.

*In the past week, have you read, viewed, or listened to...?*

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainstream websites</td>
<td>53%</td>
<td>59%</td>
<td>57%</td>
<td>56%</td>
<td>59%</td>
<td>55%</td>
</tr>
<tr>
<td>Network / cable television</td>
<td>47%</td>
<td>56%</td>
<td>58%</td>
<td>42%</td>
<td>51%</td>
<td>58%</td>
</tr>
<tr>
<td>LGBT websites</td>
<td>41%</td>
<td>44%</td>
<td>44%</td>
<td>59%</td>
<td>42%</td>
<td>38%</td>
</tr>
<tr>
<td>Mainstream radio</td>
<td>37%</td>
<td>38%</td>
<td>36%</td>
<td>36%</td>
<td>42%</td>
<td>39%</td>
</tr>
<tr>
<td>Mainstream general newspapers</td>
<td>22%</td>
<td>31%</td>
<td>41%</td>
<td>24%</td>
<td>33%</td>
<td>44%</td>
</tr>
<tr>
<td>Streaming video (TV or movies) on your computer</td>
<td>45%</td>
<td>39%</td>
<td>41%</td>
<td>42%</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td>Mainstream magazines</td>
<td>27%</td>
<td>36%</td>
<td>36%</td>
<td>23%</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td>LGBT publications for my city or region</td>
<td>21%</td>
<td>32%</td>
<td>38%</td>
<td>33%</td>
<td>34%</td>
<td>38%</td>
</tr>
<tr>
<td>LGBT blogs</td>
<td>29%</td>
<td>27%</td>
<td>22%</td>
<td>36%</td>
<td>23%</td>
<td>14%</td>
</tr>
<tr>
<td>Mainstream blogs</td>
<td>27%</td>
<td>25%</td>
<td>18%</td>
<td>26%</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>National LGBT magazine</td>
<td>12%</td>
<td>21%</td>
<td>27%</td>
<td>18%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>LGBT email newsletters</td>
<td>13%</td>
<td>18%</td>
<td>19%</td>
<td>26%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Satellite radio</td>
<td>16%</td>
<td>23%</td>
<td>23%</td>
<td>12%</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Mainstream email newsletters</td>
<td>14%</td>
<td>17%</td>
<td>18%</td>
<td>16%</td>
<td>22%</td>
<td>20%</td>
</tr>
<tr>
<td>LGBT mobile apps (Grindr, GayCities, etc.)</td>
<td>38%</td>
<td>28%</td>
<td>15%</td>
<td>4%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Mainstream alternative newspapers</td>
<td>7%</td>
<td>12%</td>
<td>14%</td>
<td>9%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>LGBT radio (on the air or streaming online)</td>
<td>6%</td>
<td>9%</td>
<td>8%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: Gay Men 18-29 n=2,260, 30-44, n=3541 45-59 n=4,802; Lesbians 18-29 n=354, 30-44 n=688, 45-59 n=935
Media Consumption

- When we asked LGBT consumers directly, most said their LGBT media consumption was mostly unchanged over the last 12 months

### Has your interaction with LGBT media (newspapers, websites, etc.) changed over the past 12 months?

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Gay Men</th>
<th>Lesbians</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reading LGBT newspapers</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Same</td>
<td>77%</td>
<td>77%</td>
</tr>
<tr>
<td>Decreased</td>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>Reading LGBT national magazines</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Same</td>
<td>76%</td>
<td>78%</td>
</tr>
<tr>
<td>Decreased</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td><strong>Visiting LGBT websites</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Same</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>Decreased</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Reading LGBT email newsletters</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Same</td>
<td>75%</td>
<td>72%</td>
</tr>
<tr>
<td>Decreased</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>Reading LGBT blogs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increased</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Same</td>
<td>69%</td>
<td>72%</td>
</tr>
<tr>
<td>Decreased</td>
<td>14%</td>
<td>11%</td>
</tr>
</tbody>
</table>

*Not tracked in 2011

Base: 2012 Gay Men n=10,963; Lesbians n=1,976
Presidential Candidate Preference

- Overwhelmingly, gay men and lesbians plan to vote for President Obama – at nearly twice the levels Mitt Romney holds among these groups (an even greater factor among lesbians)

Who do you intend to vote for in the November presidential election?

<table>
<thead>
<tr>
<th></th>
<th>Barack Obama</th>
<th>Other/Not Voting</th>
<th>Mitt Romney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gay Men</td>
<td>77%</td>
<td>18%</td>
<td>5%</td>
</tr>
<tr>
<td>Lesbians</td>
<td>84%</td>
<td>14%</td>
<td>2%</td>
</tr>
<tr>
<td>Ohio</td>
<td>79%</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>Florida</td>
<td>78%</td>
<td>17%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: 2012 Gay Men n=10,963; Lesbians n=1,976; LGBTs in Florida n=1,518; LGBTs in Ohio n=600
Obama Campaign Support

• Approximately 1 in 4 gay men and lesbians plan to donate cash to the Obama campaign; 1 in 5 already have. Overall about half say they’ll donate cash, or volunteer at some point.

How likely are you to support the 2012 Barack Obama presidential campaign?

- I plan to give a cash donation
  - Gay Men: 25%
  - Lesbians: 25%

- I have already made a cash donation
  - Gay Men: 22%
  - Lesbians: 19%

- I plan to volunteer my time for the campaign
  - Gay Men: 15%
  - Lesbians: 18%

- I am already volunteering my time for the campaign
  - Gay Men: 4%
  - Lesbians: 3%

- None of the above
  - Gay Men: 48%
  - Lesbians: 48%

Base: 2012 Gay Men n=10,963; Lesbians n=1,976
LGBT Fundraising

- Gay men and lesbians over 30 are most likely to attend ticketed LGBT fundraising events

Have you attended an LGBT fundraising event with a ticket price of $100 or more?
Past 12 Months

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequency</td>
<td>8%</td>
<td>17%</td>
<td>18%</td>
<td>4%</td>
<td>12%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base: Gay Men 18-29 n=2,260, 30-44 n=3541 45-59 n=4,802; Lesbians 18-29 n=354, 30-44 n=688, 45-59 n=935
LGBT Charitable Giving

- Almost half of gay men and lesbians have donated to an LGBT non-profit within the last year; those who didn’t indicated that they weren’t asked, or don’t have enough information.

**Have you made a financial contribution to an LGBT-focused nonprofit organization during the past year?**

**Top Motivators to Contribute**

- LGBT causes are important to me
  - Gay Men: 57%
  - Lesbians: 67%

- It’s important to give back to the community
  - Gay Men: 49%
  - Lesbians: 52%

- The organization is well-managed / will make good use of the money
  - Gay Men: 45%
  - Lesbians: 46%

- LGBT people have an obligation to support LGBT causes
  - Gay Men: 40%
  - Lesbians: 38%

**Top Reasons to NOT Contribute**

- Nobody asked me
  - Gay Men: 40%
  - Lesbians: 46%

- I’m not familiar enough with LGBT nonprofits
  - Gay Men: 40%
  - Lesbians: 36%

- I don’t feel connected to the LGBT community
  - Gay Men: 23%
  - Lesbians: 16%

- Other cause(s) are more important to me
  - Gay Men: 20%
  - Lesbians: 20%

**Has not include contributions made as entrance fees to events like Pride, bar fund-raisers, sports teams, or other informal means.**

*Base: 2012 Gay Men n=10,963; Lesbians n=1,976*
Find out more...

CMI has over 20 years of experience in the LGBT market research and communications specialty.

Contact us to learn more about acquiring analysis and reporting on the variety of topics explored in our Community Surveys, including:

- Occupation
- Media Consumption
- Living Environment
- Terminology
- Social Circle
- Brand ‘LGBT friendliness’
- Travel Behavior
- Motivations
- Networking Habits
- Sports and Recreation
- Custom Surveys, Focus Groups, Advisory Boards and other research methodologies

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