



Community Marketing, Inc.

LGBT Market Research +
Development Lab

Rivendell
the gay media company!

Lesbian Consumer Index® USA Lesbian Abstract 2007 n=10,380

CMI's *Lesbian Consumer Index*™ study is the largest, most comprehensive, and most representative consumer study of its kind in history. The report is produced and published by Community Marketing, Inc., (CMI) in collaboration with Rivendell Media. Community Marketing, established in 1992, is proudly gay-owned and -operated, and we conduct our own research.

The focus of CMI's *Lesbian Consumer Index*™ is to profile lesbian consumer preferences, attitudes, spending patterns, behaviors, and motivations regarding a wide variety of topics, including: credit cards, automobiles, electronics, entertainment, social activities, politics, and television and print media. The study identifies the unique preferences and motivations not only by gender/orientation (i.e. gay or lesbian), but also by age cohorts. In addition, comparisons to findings for mainstream (heterosexual) adults are included throughout. The full report is rich with market data, insights, historical and trend perspectives.

10,380 respondents who identified themselves as lesbian and reside in the United States completed this survey in the 34 day period from April 13, 2007 through May 16, 2007. Respondents were sourced through Community Marketing's proprietary survey pool and through partnerships with over 75 LGBT (lesbian, gay, bisexual, transgender) magazines, newspapers, websites and event organizers throughout the United States. To encourage completion of the survey, respondents were offered an incentive to win one of four travel vouchers good for travel in North America (value estimated at \$500 each). Survey respondents totalled over 25,000, and a parallel *Gay Consumer Index*™ (n=12,044) report has also been published, representing US gay male consumers. This year's study was sponsored by ABSOLUT.®

The methodology employed polls consumers representing the target audience who can be reached using LGBT print and Internet distribution resources. It should be kept in mind that findings derive from those who identify openly as lesbian, and read LGBT publications and/or websites. These results should not necessarily be extrapolated to the entire US lesbian population; however, report findings do provide guidance regarding the perceptions and opinions of "out" lesbians who can be reached by marketers through LGBT websites and publications.

Following are key findings derived from the full 100+ page report:

Respondent demographics

- Median Age: 44
- 12% Under 30
 - 14% Over 55

65% are in relationships and living together, and 23% are single.
20% have children under age 18 living in home.
83% have a pet. 51% a cat and 58% a dog.

Occupation

- Work in the Medical / Health Industry: 15%
- Work in Education: 9%
- Work in Legal/Government: 7%
- Retired: 6%

Home ownership

- Own residence: 69%
- Rent residence: 27%

Income

Median annual household income: \$80,000

- Singles \$52,000
- Couples living together \$96,000

Representative cross-section:

Respondents are well distributed throughout the United States, with the majority residing in California, Texas, New England, the Southern Atlantic, Florida, Illinois and New York.

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What lesbians do with their time

- Lesbians spent 10 hours using the internet per week for non-work purposes.
- 94% of lesbians purchased something off the internet in the last year.
- 76% use the internet for online bill paying.
- 45% downloaded music or videos from the internet in the last year.
- The median lesbian spends 10 hours per week watching TV. Lesbians are most likely to watch the major networks: NBC, ABC, and CBS, followed by Showtime (which airs "The L Word"), Fox, and gay-focused Logo.

Social and entertainment

- 97% dine out at least once per week.
- 65% dine out at least three times per week.
- 64% eat at a fine dining establishment at least once a week.
- 89% go out to dinner with friends at least once per month. This equates to an annual median of \$3,640 for dining, significantly higher than that of the average American household of \$2,434.
- 60% go shopping at brick and mortar stores at least monthly
- 53% saw at least one movie in the last month.
- 31% attended a musical concert and 26% attended live theater in the last month.
- 30% go to a bar at least monthly.
- 62% of lesbian respondents consume at least one alcoholic beverage at a bar or restaurant per week. The median number consumed by those who have at least one drink is 3 drinks.

Psychographics and motivations

- 85% of lesbian respondents said that advertising in LGBT media influences their decision to purchase products or do business with a company.
- 44% of those who consumed at least one alcoholic beverage in a bar or restaurant per week indicated that advertising in LGBT publications influenced their selection of a beverage.
- 92% of lesbian respondents reported that the way a company treats its gay and lesbian employees impacts their decision to do business with that company.
- 91% of lesbian respondents report that their purchasing decisions are influenced by corporate sponsorship of LGBT events and participation in LGBT charities.
- 68% of lesbians responded that the buying power of the LGBT market has worked to the community's advantage when it comes to recognition and social acceptance, however progress is slow as 73% of US lesbians believe that homosexuality will still be a divisive social issue in the USA in ten years.

Purchases: How lesbians spend their money

- 96% of US lesbian respondents hold at least one credit card, whereas 76% of American households have at least one credit card
- 79% of lesbian respondents used a Visa Card in the last month. 56% used a MasterCard and 24% used an American Express card.
- Clothing: median \$500 per year.
- Travel: median \$2,000 per year.

Communications

- US lesbians are most likely to read a wide variety of local and national LGBT publications. The five most read national mainstream publications include; *People*, *AARP*, *O*, *Time* and *Newsweek*. Readership of nationally distributed newspapers, especially the *New York Times*, is also high for lesbians.

Automobile ownership

- 42% of lesbians drive an SUV, and 10% drive a motorcycle or scooter.
- Purchase price (52%), fuel efficiency (46%), and reliability (36%) were cited as the most important factors lesbians consider when purchasing a new vehicle.

Active in politics and community

- 78% voted in the November 2006 mid-term election.
- 91% voted in the November 2004 Presidential election, considerably higher than the national average.
- 22% attend a community fundraising event monthly.

Retirement Planning

- 29% of lesbians, who have considered where they would like to retire, indicated they plan to retire to a LGBT retirement community.
- An additional 13% plan to retire to a private home in a LGBT resort community.
- Age plays a significant role in how lesbians responded to this question, with the majority of younger lesbians responding that it is too soon to start planning retirement, and the majority of older lesbians already settling into the home in which they plan to stay.

Additional data, plus comparisons, observations, trends, commentaries and recommendations are found in the full report.



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CMI's Lesbian Consumer Index was updated in November 2008 to include results from CMI's 2nd Annual LGBT Consumer Index study, sponsored by ABSOLUT® and Bridgestone.® The 2008 update study gathered over 20,400 completed responses via over 100 media, event and community partners. This abstract represents 4,939 American lesbians.

Purchases in the last 12 months:

Lesbians have ramped up their technology purchasing...

- 64% bought a cell phone or PDA, up from 47% in the 2007 study
- 38% bought a personal computer, up from 29% in the 2007 study
- 29% bought stocks, bonds or mutual funds
- 27% bought a high definition TV, up from 17% in the 2007 study
- 25% bought an automobile
- 18% bought gold/precious metals/gemstones
- 7% bought a primary residence
- 5% bought a vacation home

Personal time online:

- 34% Email
- 20% Read or conduct research
- 9% Pay bills or check balances
- 8% Download or listen to music
- 8% Shop
- 7% Chat or visit social/dating sites
- 6% Play online video games or gaming
- 5% View videos or video websites

Lesbians play video games online twice as much as gay men, while spending half as much time as gay men on chat/social & dating sites and watching videos.

With the increase in technology purchases, lesbians are spending 60% more personal time on the internet: 16 hours/week, vs. 10 hrs/wk in 2007. Those high-def TVs may be influencing hours spent watching TV, which increased 30% to 13 hours/week, from 10/week in 2007. This compares to 13 hours/week spent listening to music and 9 hours reading.

Discrimination in the Workplace

Almost 2 out of 3 lesbians (66%) have never encountered any form of discrimination in the workplace. However, of those encountering discrimination, 20% report it is a result of being a woman. Lesbians rate their employers an average rating of 7 (on scale of 1-10) on LGBT-friendliness.

Top magazines and newspapers read at least monthly:

- 38% Advocate
- 32% Curve
- 27% Local LGBT publications
- 24% People
- 23% New York Times, compared to 30% for gay men
- 20% AARP
- 18% Local mainstream publications

Readership percentages have increased overall when compared to last year.

Top TV Stations / Networks:

- 50% ABC
- 48% NBC
- 45% CBS
- 40% Logo
- 34% Bravo
- 32% A&E
- 31% Showtime
- 31% Fox
- 30% CNN
- 29% Discovery

Dining and drinking are important:

- \$69 / week: restaurants (mean)
- \$22 / week: bars / alcohol (median of 2 drinks/week)
- 38% dine with friends at least weekly
- 12% go to a bar or club weekly.

Lesbians report drinking twice as much over last year's survey, when the median was 1 drink/week

Popular drinks (frequency of consumption 1-3, on 1-7 scale) include:

- 56% beer
- 53% wine
- 37% vodka

What lesbians prefer their Community to be called...

Lesbians prefer that the community be addressed as "gay and lesbian" (44% rated the term 7 on a scale of 1-7), followed by LGBT (40%).

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86% voted in the last 12 months

Most important issues influencing voting (% rating 1, on a 1-5 scale):

- 80% legalizing gay marriage
- 73% ending the Iraq War
- 72% plans to strengthen the economy
- 68% protecting the environment
- 64% universal health care
- 58% education

Issues that do not resonate:

- 22% tightening immigration laws
- 22% increasing national security
- 33% cutting taxes
- 34% increasing gun control

Education ranks higher with lesbians than gay men (58% vs. 47%). This could relate to lesbians being more likely to have children in the household. The four issues that resonate least mirror those ranked lowest by gay men.

The chief “mainstream” means of political polling, telephone surveys, are unlikely to reach lesbians who take online surveys.

- 58% said it is very unlikely they would participate in a telephone survey, versus only
- 3% who said it is very unlikely they would participate in an online survey.

Lesbians will enjoy numerous income streams during in retirement:

Percent who make regular contributions to:

- 64% Social security
- 56% Savings account
- 43% Company-sponsored 401k
- 36% IRA contributions
- 28% Stock investments
- 24% Real estate investments
- 20% Traditional pension plan

Charitable Contributions

- 15% gave more than \$1,000 to charity in the last 12 months.
- 5% gave more than \$1,000 to a LGBT-specific charity(ies).

Occupation

Although the occupations of lesbians are widely distributed across all sectors of the economy, over one third have attained high positions in their fields:

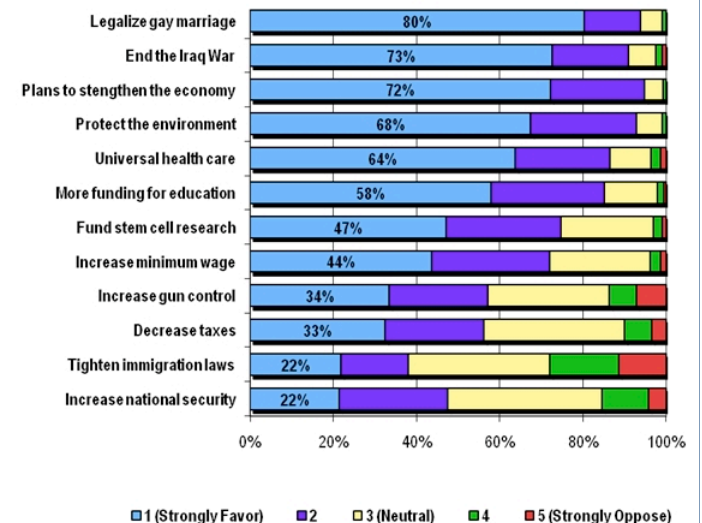
- 20% manager or supervisor
- 10% owner / officer
- 8% senior management

Additional data, plus comparisons, observations, trends, commentaries and recommendations are found in the full report.

Purchases and investments:

	Did you purchase any of the following in the last twelve months?
Cellular Phone (including PDAs)	63.6%
Personal Computer or Laptop (for home use)	37.9%
Stocks, bonds or mutual funds	29.0%
High Definition TV	26.5%
Automobile	24.7%
Gold or other precious metals or gemstones	17.9%
Television (other than High Def)	7.5%
Primary Residence (home, condo, etc.)	7.2%
Vacation home or other non-primary residential real estate	4.6%

Voting issues of importance:



Please visit www.CommunityMarketingInc.com for more information about CMI's *Lesbian Consumer Index*, and to order the full report. Also available is the parallel *Gay Consumer Index* study of US gay male consumers. Full reports contain data, graphics, analysis, observations, comparisons, commentaries from community leaders, and practical recommendations based on Community Marketing's 16 years of market research and client services leadership in this dynamic market segment. Community Marketing also offers Cross-Tab reports derived from the *Lesbian Consumer Index*™, and provides custom survey, focus group and field study services.