



LGBT Market Research +  
Development Lab™

**Rivendell** *the gay media company!*

# CMI's 3<sup>rd</sup> Annual LGBT Consumer Index™ 2009-10

## *Gay & Lesbian American Report*

Presenting CMI's LGBT Consumer Index™  
the most comprehensive and demographically representative  
LGBT consumer study in history, with over **30,000** survey participants worldwide.

Establishing baselines.  
Exploring motivations, preferences and sensitivities.  
Tracking and anticipating trends.

# ***GAY & LESBIAN CONSUMER INDEX® STUDY: American Report***

**November 25, 2009**

## ***INTRODUCTION and METHODOLOGY***

Every year, Community Marketing, Inc. (CMI) conducts the broad-based LGBT Consumer Index™ Survey.

During the 49-day period from July 30, 2009 to September 16, 2009, Community Marketing, Inc. conducted an online survey of self-identified gay men and lesbians from CMI's proprietary survey panel, as well as participants pointed to the survey from a variety of partners. For the purposes of this report, those participants who self-identified as "queer," "transgender" or "bisexual" were not included in the analyses unless they *also* identified as lesbian or gay. However, this additional data is available in separate reports.

Of the over **30,000 total survey participants** worldwide this year, more than 21,000 were gay and lesbian Americans, who are the subject of this report (although not all questions were answered by every person because of personal preference or survey logic).

Results are analyzed as the full field, and often, comparisons are investigated. In 2008, the survey compared the consumer spending habits and opinions regarding social issues for gay men and lesbians. In 2009, the survey explored differences between gay men and lesbians under 35 vs. over 40.

Subscribers to this survey panel received an email invitation to take a gay/lesbian survey, with an incentive to win one of several prizes. Some survey questions invite multiple responses, and in these cases, percentages total more than 100.

### ***Entire LGBT community compared to gay man and lesbians reached through the LGBT media***

We don't attempt in this study to quantify or define the LGBT population (which is virtually impossible for many reasons), nor are these findings intended to represent or profile the entire US gay and lesbian population (similarly challenging). Instead, these findings are designed to provide guidance to companies looking to understand gay and lesbian consumers, and who outreach to the LGBT community through their media, organizations and events.

## Survey Demographics

The purpose of the survey is to give guidance to corporations considering advertising in the gay and lesbian media (print and Internet). The demographics of this survey are consistent with the reader profiles of the majority of LGBT media, trending significantly towards white and male (except for specific lesbian media), and middle aged.

Among the 30,000+ total responses worldwide, all of the respondents profiled in this survey were from the United States. Most (83.2%) were Caucasian, 6.4% Latino, 4.4% African American, 2.0% Asian, 4% other/mixed ethnicity.

The median age for lesbians and gay men was similar, respectively 46 and 45.

Of the American gays and lesbians profiled in this report, 73.5% (n=15,848) self-identified as gay men, and 26.9% (n=5,809) self-identified as lesbian. While the survey did have significantly more male than female respondents, the overall large number of lesbian respondents allows for statistically significant gender comparisons.

More than two-thirds (71%) of participants reported having earned a college or graduate education, with the highest percentage of respondents saying they had a B.A. (43%). Compared to lesbians, gay men were more likely to say they had ended their education after high school (30% compared to 26%). Lesbians were more likely than gay men to report having gone on for Master's degrees (25% compared to 20%) but about 7% of both groups reported having achieved doctoral degrees.

The majority of participants reported being employed full time (62%), with another 12% reporting that they were self-employed, and 10% reporting that they were employed part-time. Others reported being unemployed (8%), students (7%), retired (8%) or disabled (4%).

### *Survey Panel*

Community Marketing has developed its proprietary research panel of 50,000+ LGBT consumers over the last 17 years by partnering with leading media companies from across the United States and around the world, as well as with LGBT organizations and events.

Special thanks to our media and event partners that contributed participants to this year's study:

103.9 PROUD FM	NEXT Magazine
365gay.com	Our Lives Magazine
411 Magazine	Out & About Newspaper
Adelante Magazine	Out Front Colorado
Alpenglow Productions Corp	Out In Jersey Inc.
Bay Area Reporter	Out on the Coast magazine
Best Lesbian Links	Outword Magazine Inc
Bleu Magazine	Philadelphia Gay News
Boi Magazine	Pink Banana Media
Camp Magazine	Pittsburgh's OUT
Compete Magazine	Pride Source Media Group
Curve Magazine	Q-Notes
Dallas Convention & Visitors Bureau	QSanAntonio Publishing
Dallas Voice	Regent Media / Advocate.com
Damron Gay Travel Guides	Regent Media / Gay.com
David Atlanta Magazine	Regent Media / HIVPlusMag.com
DNA Publications P/L	Regent Media / Out Traveler
Echelon Magazine	Regent Media / Out.com
EDGE Publications	Regent Media / PlanetOut.com
FlawLes/ FlawLes Magazine	Regent Media / Popnography.com
Frontiers Media	Regent Media / SheWired
Fugues/Editions Nitram	Rivendell Media
Gay Ad Network	San Francisco LGBT Community Center
GayCalgary and Edmonton Magazine	SinCityQSocials.com LLC
GayCities, Inc.	South Florida Blade
Hotspots Magazine	Southern Voice
Instinct Magazine	The Leather Journal
JANE & JANE Magazine	TOM Consulting Ltd.
Lesbian Connection	Travel Portland
LGBT Center of SE Wisconsin	Washington Blade
LGBT Community Center of Greater Cleveland	Windy City Media Group
Manhunt / Online Buddies, Inc.	
Metro Star	
Metro Weekly	

## Key Survey Findings

### **Gay Men and Lesbians Are Very Similar to Each Other in Their Attitudes and Behaviors**

In general, gay men and lesbians responded to questions remarkably similarly in this report. While this report does point out many differences, what should be also recognized is that most of these differences were often small. Responses to some categories differed more than 5 percentage points, and given the margin of error, it cannot be concluded that these are major gender differences. Of course, there were some questions where gay men and women responded very differently, and are indicated.

#### **Living Environment**

One area where we found major differences between men and women was the make-up of the average household. Compared to gay men, lesbians are more likely to report living with a partner, often with children, and with pets. They are also more likely to report living outside cities and to report owning a home and/or a car.

In contrast, gay men are more likely to report living alone or with a roommate, in cities (especially big cities), and renting. Lesbians were more optimistic about relationships, in general, with 75% indicating that they have equal possibilities for building a strong relationship with a partner compared to straight individuals, compared to 63% of gay men.

Although all participants were especially likely to say they lived in big (40%) or medium-sized (21%) cities, gay men were more likely to say they lived in big cities (42%) than lesbians were (32%). About one-third of lesbians (34%) said they lived in a place other than a city (a small town, suburb, rural area, or resort community), compared to only 27% of gay men.

The majority of participants said they owned their own homes (54%) rather than renting (39%). Gay men were more likely to report renting (41%) than lesbians were (35%). With regard to the type of homes they lived in, lesbians were more likely than gay men to say they lived in urban stand-alone homes (24% compared to 20%), suburban stand-alone homes (27% compared to 22%) or rural homes (12% compared to 9%). Compared to lesbians, gay men were more likely to say they lived in urban condos or townhouses (17% compared to 9%) or apartments (23% compared to 18%).

Almost half of participants (46%) said they lived with a spouse, partner or lover, whereas about one-quarter (29%) of participants said they lived alone, and/or with a dog (27%) or cat (23%). Smaller percentages of people said they lived with a roommate (12%), children (9%, including 7% with children under 18), and/or a parent (7%).

Compared to gay men, lesbians were more likely to report living with a spouse or partner (59% compared to 42%), a child under or over 18 (19% compared to 5%), and/or a dog (39% compared to 23%), cat (38% compared to 18%) or some other pet (10% compared to 5%). Gay men were more likely than lesbians to report living alone (33% compared to 19%), with a roommate (14% compared to 8%), or with a parent (7% compared to 6%).

## **Participation in Entertainment**

Reflecting on the kind of entertainment they enjoyed, participants were the most likely to say they dined out with friends or enjoyed the outdoors at least weekly or monthly. Perhaps because of their greater tendency to live alone, gay men were more likely than lesbians to say they dined out with friends at least once a week (37% compared to 27%). Consistent with their greater tendency to live outside cities, lesbians were more likely than gay men to report enjoying the outdoors on a weekly basis (41% compared to 33%). Going out to a bar, club or performance was also relatively popular. Compared to lesbians, gay men were more likely to report weekly or monthly enjoyment of bars or clubs (49% of gay men compared to 31% of lesbians), going out to a movie (40% compared to 29%), or going to a live performance (21% compared to 14%).

Participants reported attending other activities less frequently. Although about one-quarter of lesbians (26%) and more than a third of gay men (38%) reported going to a gym or athletic club at least once a week, overall 48% of participants reported going to a gym or athletic club less than once a year.

About one-third of lesbians (37%) and gay men (33%) said they attended a community fundraiser about once a year. Activities that a majority of participants reported doing less than once a year included going to political fundraisers, getting professional massages or going to yoga classes, with gay men being less likely than lesbians to report these activities.

Participants also reported on the amounts they spent on restaurants, bars and alcohol, coffee or tea, or other expenses each week. Restaurant-goers, the biggest spenders, reported spending over \$60 a week on meals. People who went to bars or bought alcohol reported spending about \$30/week, somewhat more than the \$26/week some reported spending on clothing. Those who said they drank coffee or tea said they spent about \$14/week on coffee or tea, and those who said they drank bottled water said they spent about \$10/week on the water.

## **Beverage Consumption**

Reporting on what they drank at bars, restaurants or clubs, the greatest percentage of participants reported drinking beer, wine and vodka. Beer and wine consumption was similar between gay men and lesbians, but gay men were much more likely to drink vodka, and other types of spirits.

Participants reported on how many beers of specific brands they consumed per week. They tended to report drinking light beers (such as Miller Light, Coors Light, and Bud Light) the most frequently and that they consumed on average between 5 and 6 beers of these brands per week. Coors, Budweiser, Miller, and other brands were also reportedly consumed relatively often.

When asked about their weekly consumption of beer and wine at bars and restaurants, about two-thirds (69%) said they drink alcohol at bars and restaurants. About 16% each of participants reported drinking one or two drinks at a bar or restaurant per week. Not counting people who said they didn't drink in bars or restaurants, the average number of drinks that was reportedly consumed in these locations per week was about five.

## **Other Purchases and Influences on Purchasing**

Participants were also asked about other purchases they tended to make. Thinking about purchases of sports equipment in the past year, respondents were most likely to mention buying running shoes (33%). Bikes were the item they said they bought next most commonly (13%), whether mountain bikes (5%), city/hybrid bikes (4%) or road bikes (4%); only 1% said they bought a moped. Others reported buying camping equipment (13%), hiking boots (8%), or a kayak or canoe (2%). Less than 1% of respondents said they bought Alpine skis, mountain climbing gear, or snowboards.

Consistent with lesbians' reports of being more likely to live in suburban or rural areas than gay men were, they were also more likely than gay men to report buying different kinds of sports equipment in the past year, including running shoes (36% compared to 32%), camping equipment (20% compared to 10%), hiking boots (11% compared to 7%).

As for other purchases made in the past 12 months, survey respondents were especially likely to mention buying electronic equipment, such as laptop computers (29%), PDA/Smart phones (28%), high-definition televisions (26%) or standard cellular phones (24%). About one-fifth (21%) also said they bought stocks, bonds or mutual funds in the past year. Approximately 17% reported buying a car and 5% reported purchasing a home/primary residence within the last year.

Gay men were more likely than lesbians to report past-year purchases of a PDA/Smart phone (30% compared to 24%), high-definition TV (27% compared to 22%), or a desktop computer (14% compared to 10%), but were less likely to report buying a standard cellular phone than lesbians were (23% compared to 29%). Gay men were also more likely to say they invested stocks, bonds, or mutual funds in the past year (23%) than lesbians were (18%). However, the two groups did not differ in the likelihood with which they reported buying a laptop, an automobile, or a home.

Participants also reported on company practices they thought had the most influence on their purchasing decisions. They were the most likely to mention the strong influence of companies having fair employment practices (45%)—such as non-discrimination in hiring or recognition of domestic partners—as well as gay-friendly policies (42%). Participants were almost as likely to mention the strong influence of companies supporting LGBT political causes (37%), LGBT organizations or charities (34%) or LGBT events (29%).

As for brand loyalty, more than half (53%) of respondents said they were loyal to certain brands but might try new brands. Another one-quarter said they preferred certain brands but constantly tried new brands. About 12% of respondents reported consistent brand loyalty.

With regard to cause-related marketing, the greatest percentage of respondents (53%) viewed it as a marketing tool even if it did help a cause. Gay men were more likely to express such an opinion (55%) than lesbians were (50%). The next largest group of respondents (42%) saw cause-related marketing as a good way to raise money and awareness for a cause, with lesbians being more likely to endorse such views (47%) than gay men were (40%).

For participants as a whole, preferred marketing terms to describe the gay and lesbian community were “Gay and lesbian” (Mean = 4.3), “Lesbian and gay” (Mean = 4.0), “LGBT” (Mean = 4.0) and “Gay-friendly” (Mean = 4.0). When comparing LGBT vs. GLBT, women strongly prefer LGBT, but the men view the two equally favorably. While most terms commonly used in gay and lesbian marketing campaigns were viewed positively, the terms Queer, Alternative and LGBTIQQ were viewed neutral to negative.

## Media Preferences

Participants were next asked about their consumption of media, including how many hours they spent involved in different activities per week. Compared to working—at which participants said they spent the most time (Mean = 37 hours/week)—the activities participants reported doing the next most often included: using the Internet for personal use (Mean = 13.1 hours/week), watching TV (Mean = 12.2 hours/week), listening to music (Mean = 10.5 hours/week), listening to the radio (Mean = 6.7 hours/week), reading (Mean = 5.8 hours/week), and working out (Mean = 4.0 hours/week). Compared to lesbians, gay men tended to report a greater number of hours per week spent using the Internet for personal use (Mean = 14 hours/week compared to 11) and watching TV (Mean = 13 hours/week compared to 11).

With regard to blogs they read at least monthly, participants were most likely to indicate reading the Huffington Post (18%), other blogs (10%), Towleroad (9%), and Perez Hilton (8%). Gay men were more likely than lesbians to say they read Towleroad (11.2% compared to 2.1%) or Perez Hilton (8.6% compared to 6%) monthly, and less likely to say they read Queerty (6.2% compared to 13.7%) or Pam’s House Blend (3.7% compared to 6.1%) at least once a month.

Facebook was the most popular social networking site, with a remarkable 66% of participants saying they logged on to the site at least once a month, compared to 25% for MySpace. A little less than one-fifth of participants said they visited LinkedIn (19%) or Twitter (18%) at least monthly. Lesbians were just as likely as gay men to say they visited Facebook or Twitter.

In general, participants said they used social networking sites to socialize, whether to stay in touch with friends (63%), find old friends (45%), for entertainment (43%), or to stay in touch with family (34%). Finding information—for example, about upcoming events (32%), the LGBT community (30%), or new places to go (25%)—was the next most common motivation. About one-quarter also reported motivations to date (23%) and hook up (22%). Using the sites to research products and services was noted by another 12% of participants.

Compared to lesbians, gay men tended to report using social networking sites more for entertainment (46% compared to 36%), and discovering new places to go (27% compared to 21%). They were also much more likely than lesbians to report using the sites for dating (28% compared to 9%) or to hook up (30% compared to 3%). In contrast, lesbians were more likely than gay men to say they used the sites to network with family (38% compared to 32%). Gay men were also more likely to report responding to ads on mainstream blogs/social networking sites (25%) or on LGBT blogs/social networking sites (39%) than lesbians were (each 14%).



In general, the media that participants said they were most likely to turn to on a daily basis were television (72%), radio (59%), mainstream Internet sites (51%) and mainstream daily newspapers (39%). (Note that most LGBT media, which also ranks highly, is published weekly or monthly).

As for use of electronic communication, participants reported being most likely to check e-mail a few times a day (46%), to text a few times a day (31%), and to check Facebook a few times a day (28%). A greater percentage of gay men (45%) than lesbians (38%) said they checked their e-mail all day long. Lesbians reported greater use of Facebook than gay men did, with only 23% saying they never used it, compared to 27% of gay men. Gay men and lesbians did not differ in the overall frequency with which they reported that they texted, checked MySpace, or tweeted.

### **Social Issues**

In general, the majority of participants agreed that compared to their straight friends, family and colleagues, they had equal possibilities for a good career, and to feel comfortable and accepted in the workplace. However, although they agree with the statement, it was split almost equally between agree, and strongly agree.

Approximately two-thirds of participants agreed that they'd be more likely to face violence than straight people they knew.

The greatest percentage of participants (46%) also said they had an equal mix of gay and straight contacts and friends. About one-third (31%) of participants said their contacts and friends were primarily gay or lesbian with only a few being straight.

Almost three-quarters (72%) of participants in the study reported positive views of getting married, saying that they probably wanted to get married (33%), definitely wanted to get married (29%), or were already married (10%). Lesbians were more likely than gay men to say they definitely wanted to marry (33% compared to 27%) or were already married (16% compared to 9%).

However favorably gay men and lesbians felt about marrying, the greatest percentage of respondents (39%) said they definitely did not want to have children. A greater percentage of lesbians than gay men said they definitely do want to have children (12% compared to 9%) or already had them (30% compared to 13%).

### **Financial Planning & Philanthropy**

As for retirement plans and savings vehicles, participants were most likely to say they regularly contributed to personal savings accounts (45%), Social Security (38%), or company-sponsored 401k retirement accounts (35%). Somewhat fewer participants mentioned contributions to company pension plans (26%), Individual Retirement Accounts (23%), or personal stock, bond or mutual fund investments in taxable non-retirement accounts (22%). Less than 10% said they put money in other types of savings plans or investments. Gay men and lesbians were very similar in their retirement plan and savings choices.

Participants varied considerably in their tendency to give to charity. Although the largest percentage of participants (18%) said they had contributed less than \$25 to charitable organizations in the past year, about 13% reported giving between \$1000 and \$4999. 31% of lesbians and 33% of gay men reported giving over \$500 in the past year. Gay men and lesbians generally reported similar levels of contribution.

With respect to contributions to LGBT-specific charitable organizations in the past year, the largest percentage of participants (35%) said they had contributed less than \$25. Approximately 16% of gay men and 11% of lesbians reported giving over \$500 to LGBT-specific charitable organizations. Comparing with their overall giving patterns in the previous question, large donors over \$500 are more likely to give their money to non-LGBT causes (although some of these causes could be HIV-related, which was not specifically asked in this question).

### **Work and Business Activity**

In general, participants were especially likely to say they worked in businesses other than those listed in the survey (19%), such as real estate, transportation, entertainment, publishing, computers, or law. Another 12% said they worked in health care, 10% in education, 7% each in retail or government, and 6% each in non-profits, or were retired or not looking for work. Lesbians were more likely than gay men to say they worked in health care (15% compared to 10%) or education (13% compared to 9%).

Of participants responding to a question about their positions within their organizations, one-quarter (25%) reported being mid-level managers/professionals, 12% reported being senior managers or professionals, and 10% each said they were officers/owners, or entry- or junior-level professionals.

The greatest percentage of participants (27%) gave their employers a rating of 10 out of 10 for being very LGBT-friendly. The average rating was 7.2 out of 10.

Asked if they make purchasing decisions for their employers, over one-third (37%) of participants said they do. Gay men were more likely to say they made such decisions (39%) than lesbians were (34%).

In general, those who said they made purchasing decisions at work (and noted influences on their decisions) were especially likely to say they tried to purchase from LGBT-friendly companies but had to consider other factors (44%). Another one-third (35%) said they tried to keep their personal purchasing preferences separate from their work, with gay men stating this preference (36%) more than Lesbians did (27%). Lesbians were more likely than gay men to say they would apply their personal purchasing preferences in the workplace (25% compared to 20%) or try to purchase from LGBT-friendly companies even as they considered other factors (48% compared to 43%).

### **Religion**

Participants were asked a small set of questions about their religious upbringing and preferences. Almost half of participants (47%) said that their family of origin was moderately or somewhat religious, whereas 31% said their families were very religious and 22% said their families were not very religious.

Although participants had said they generally came from religious families, almost half (45%) said they currently were not very religious. A somewhat smaller group (37%) said they were religious but do not attend services regularly. Only 17% considered themselves part of a church or faith community. Lesbians and gay men did not differ in their responses to this item.

### **Travel & Transportation**

Most respondents (81%) said they owned a car. Consistent with being more likely to live outside cities, lesbians were more likely to say they owned a car than gay men were (88% compared to 79%). Of those who said they owned a car, the majority (57%) said they had bought it new. Gay men were more likely to report buying a car new (59%) than lesbians were (53%). In general, respondents making car payments said the average car payment was \$317 per month. Consistent with reporting that they were more likely than lesbians to buy a new car, gay men also reported higher average car payments (Mean = \$338) than lesbians did (Mean = \$262).

Participants were especially likely to say they owned or leased a Toyota (16%), Ford (16%), Honda (13%) or a Chevrolet (11%). Gay men and lesbians who owned or leased cars reported largely similar preferences in American brands.

A small set of questions was asked about travel. These questions supplement Community Marketing's 14<sup>th</sup> Annual Travel Survey (October 2009), which is a separate report.

Other than the 14% of participants who said they did not stay in a hotel in the past year, about a third of respondents (33%) said they had paid over \$300 a night for a hotel room. However, due to the recession, even many luxury hotels now sell for less than \$300 a night.

Besides the 28% of participants who said they did not fly in the past year, about half (54%) of participants said they flew coach when they flew. Only 18% of respondents said they flew business- or first-class, of which the largest group (5%) said they flew business or first class 1% to 5% of the time. Of those who did report taking round trip flights in the past year, lesbians were less likely to say they flew business- or first-class (15%) than gay men were (30%).

## **Perceptions of Economic Recession**

Participants were also asked about their views of the economic recession. Almost half (48%) thought the U.S. was in the middle of a recession and that it would not be over soon. The next largest group (34%) thought the recession would be over soon, while smaller percentages thought things would get worse (15%) or that the recession had already ended (2%). Lesbians were more likely than gay men to think the U.S. was in the middle of a recession (54% compared to 46%), while gay men were more optimistic in thinking the recession would end soon (36% compared to 27%).

According to participants, the main effect of the recession had been to force them to cut spending (53%), although about one-third (31%) said they had not felt any effect on income or spending. Smaller percentages of respondents reported having lost pay (28%) and/or a job (17%). Only 5% of respondents reported thriving during the recession. In response to the recession, respondents have said they especially changed their spending on food and incidentals—whether eating out at restaurants less often (64%), eating at less expensive restaurants (49%), buying more store brands (47%), or using more coupons (43%). Smaller percentages of respondents reported tackling larger expenses—paying down a debt (38%), canceling or postponing a vacation (35%), or trying to buy at a discount generally (24%). Another 16% said they had tried to increase their savings or retirement contributions. Participants also reported giving up hobbies (15%) or taking public transportation (13%) to reduce costs.

Compared to gay men, lesbians were more likely to report that as a result of the recession they were eating out less (69% compared to 62%). Gay men were more likely to report paying down debt (40% compared to 35%) or buying at a discount (28% compared to 20%) as a result of the recession.

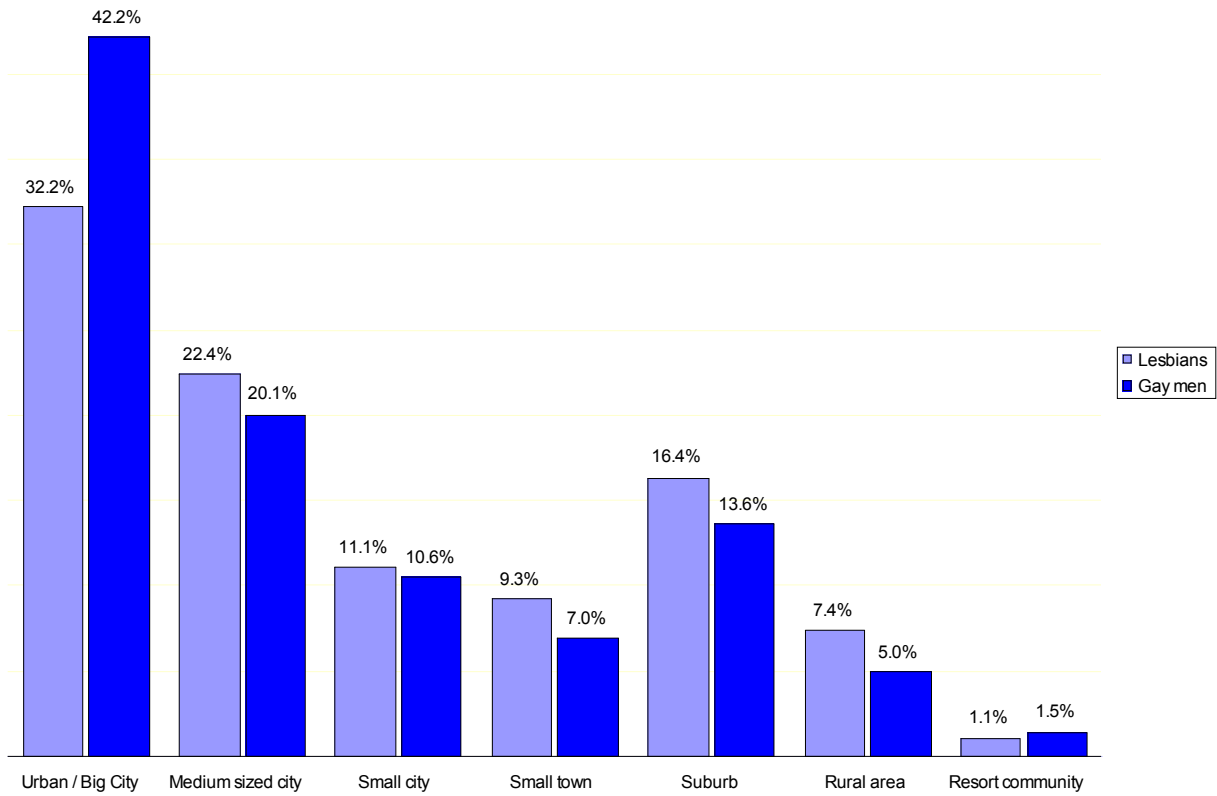
## **Most Important Issues for LGBT Americans**

Finally, participants were asked what they considered the most important issue(s) for LGBT Americans and elected officials to act on today. Consistently LGBT-specific concerns were more important to LGBT Americans than more broad personal issues such as health care or money issues. Gay men and lesbians were similar in their concerns, except for HIV, which was more of a concern for gay men.

Living Environment

Type of Living Environment:  
Gay Men and Lesbians

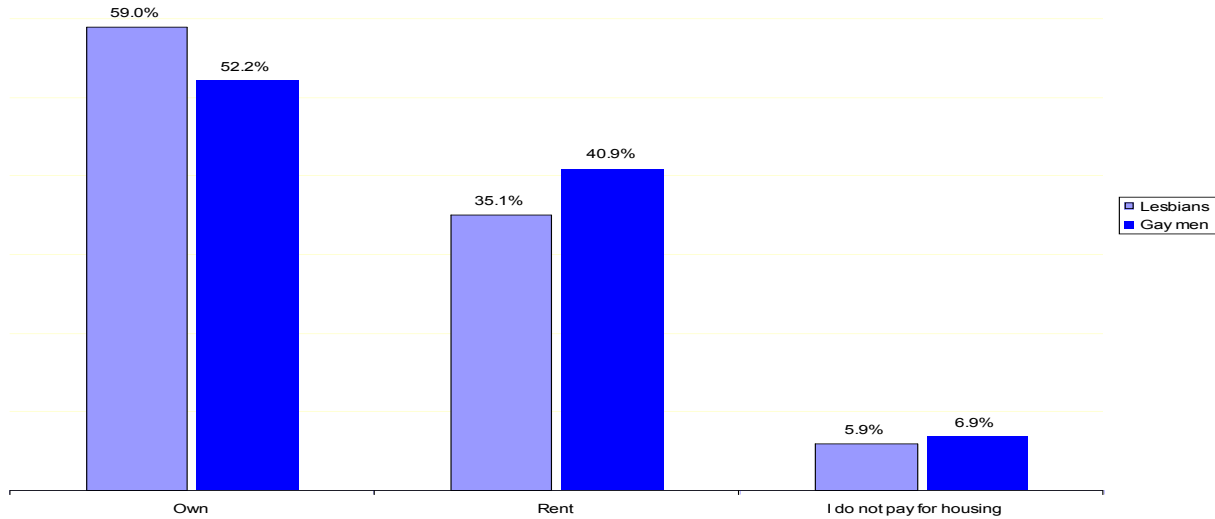
What type of environment best describes the place in which you live?



Although all participants were especially likely to say they lived in big (40%) or medium-sized (21%) cities, gay men were more likely to say they lived in big cities (42%) than lesbians were (32%).

### Own or Rent Residence: Gay Men and Lesbians

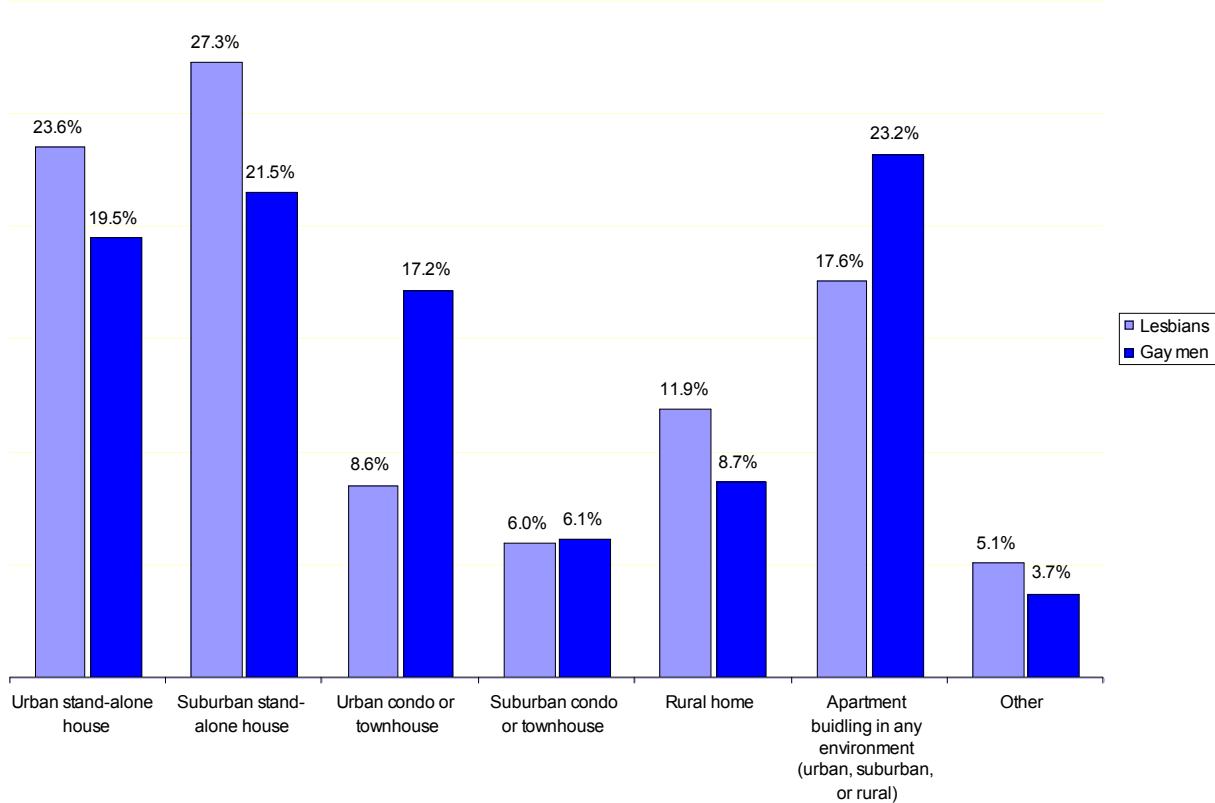
*Do you own or rent your primary residence?*



The majority of participants said they owned their own homes (54%) rather than renting (39%). Gay men were more likely to report renting (41%) than lesbians were (35%).

**Type of Residence:  
Gay Men and Lesbians**

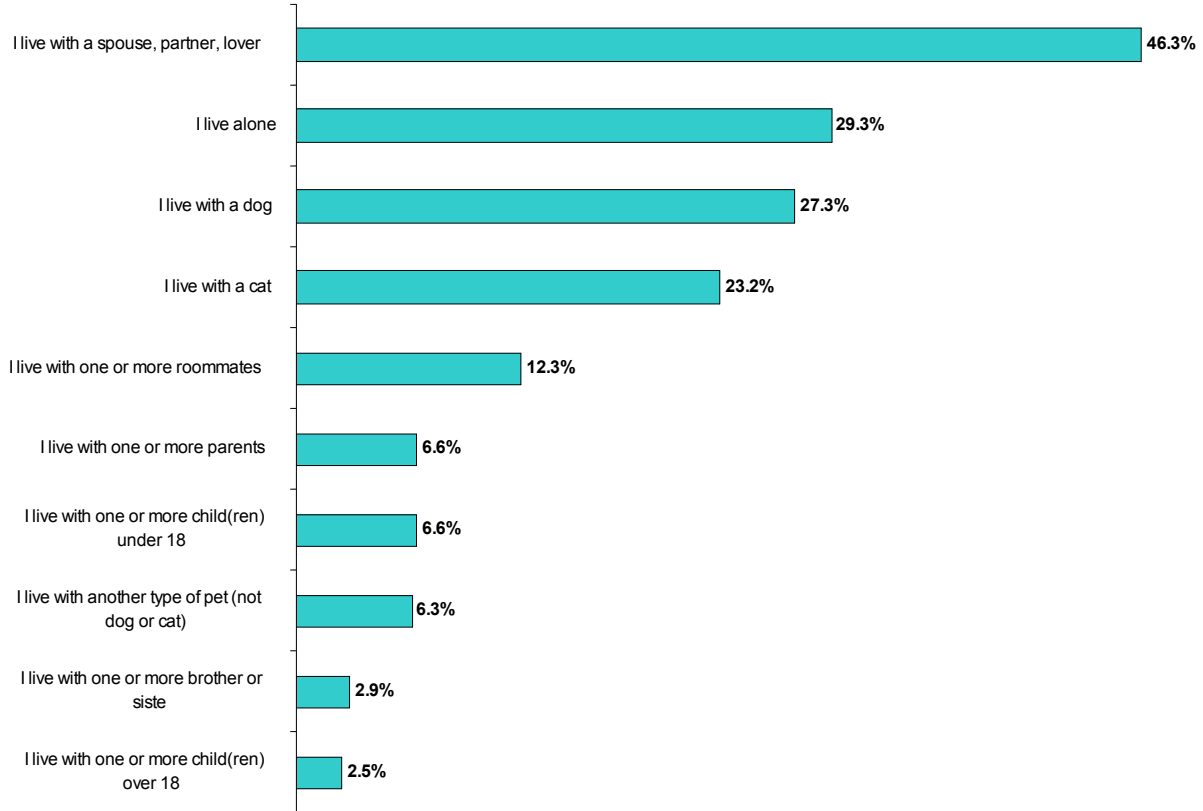
*What type of residence do you live in?*



With regard to the type of homes they lived in, lesbians were more likely than gay men to say they lived in urban stand-alone homes (urban, suburban or rural) (63% compared to 51%). Compared to lesbians, gay men were more likely to say they lived in urban condos or townhouses (17% compared to 9%) or apartments (23% compared to 18%).

### Who Lives in Household

Who lives in your household? Mark all that apply. (Respondents were allowed to choose **multiple** responses)

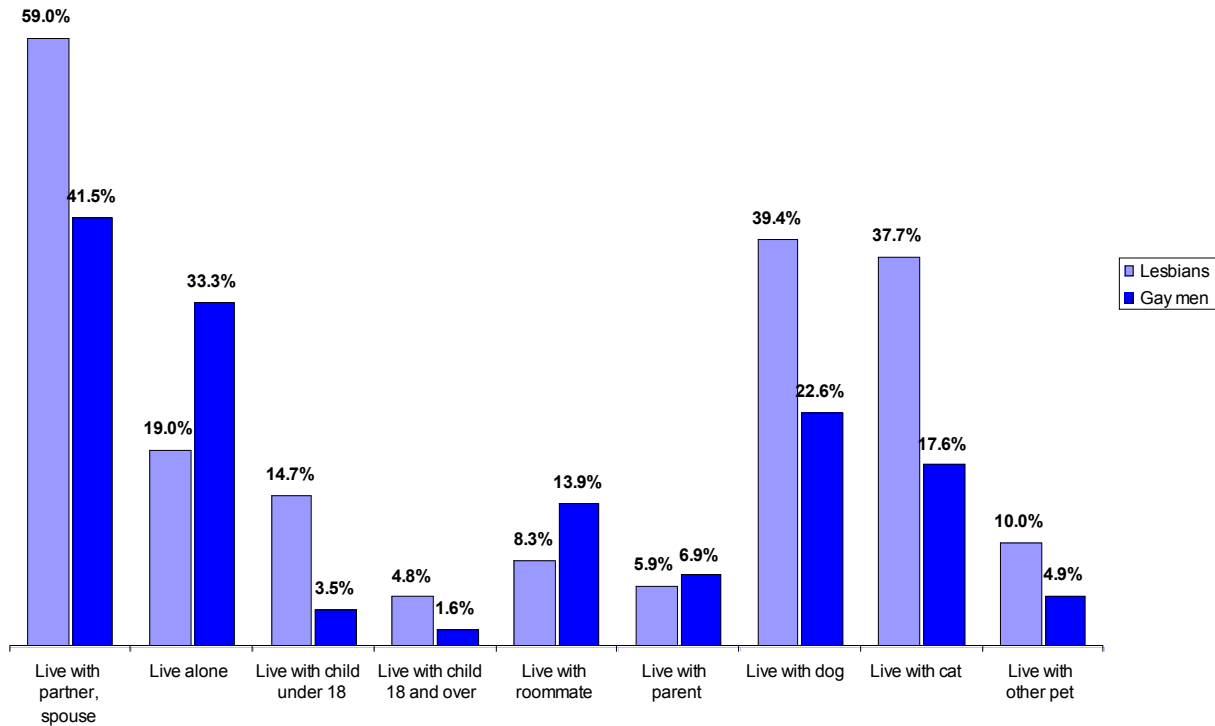


Almost half of participants (46%) said they lived with a spouse, partner or lover.



### Who Lives in Household: Gay Men and Lesbians

Who lives in your household? Mark all that apply. (Respondents were allowed to choose **multiple** responses)

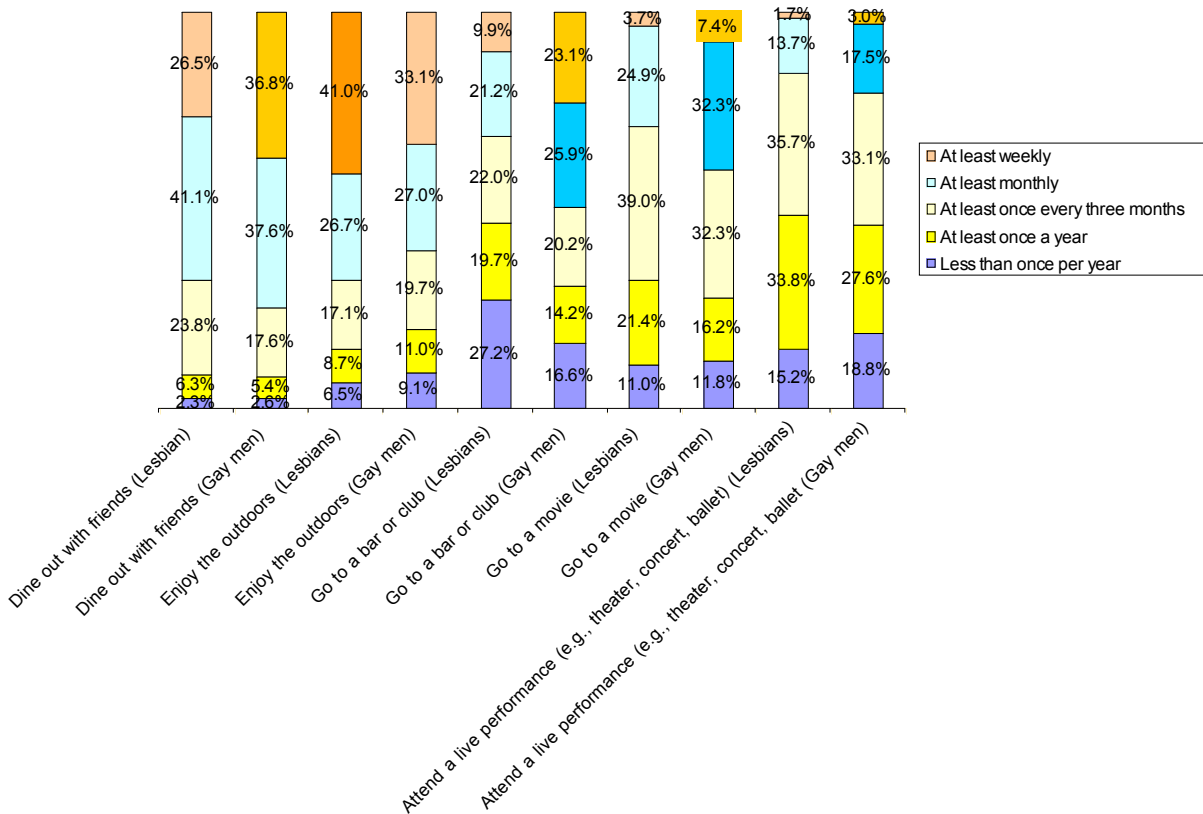


Compared to gay men, lesbians were more likely to report living with a spouse or partner (59% compared to 42%), a child under or over 18 (19% compared to 5%), and/or a dog (39% compared to 23%), cat (38% compared to 18%) or some other pet (10% compared to 5%). Gay men were more likely than lesbians to report living alone (33% compared to 19%), or with a roommate (14% compared to 8%).

Entertainment

Participation in Entertainment: Gay Men and Lesbians

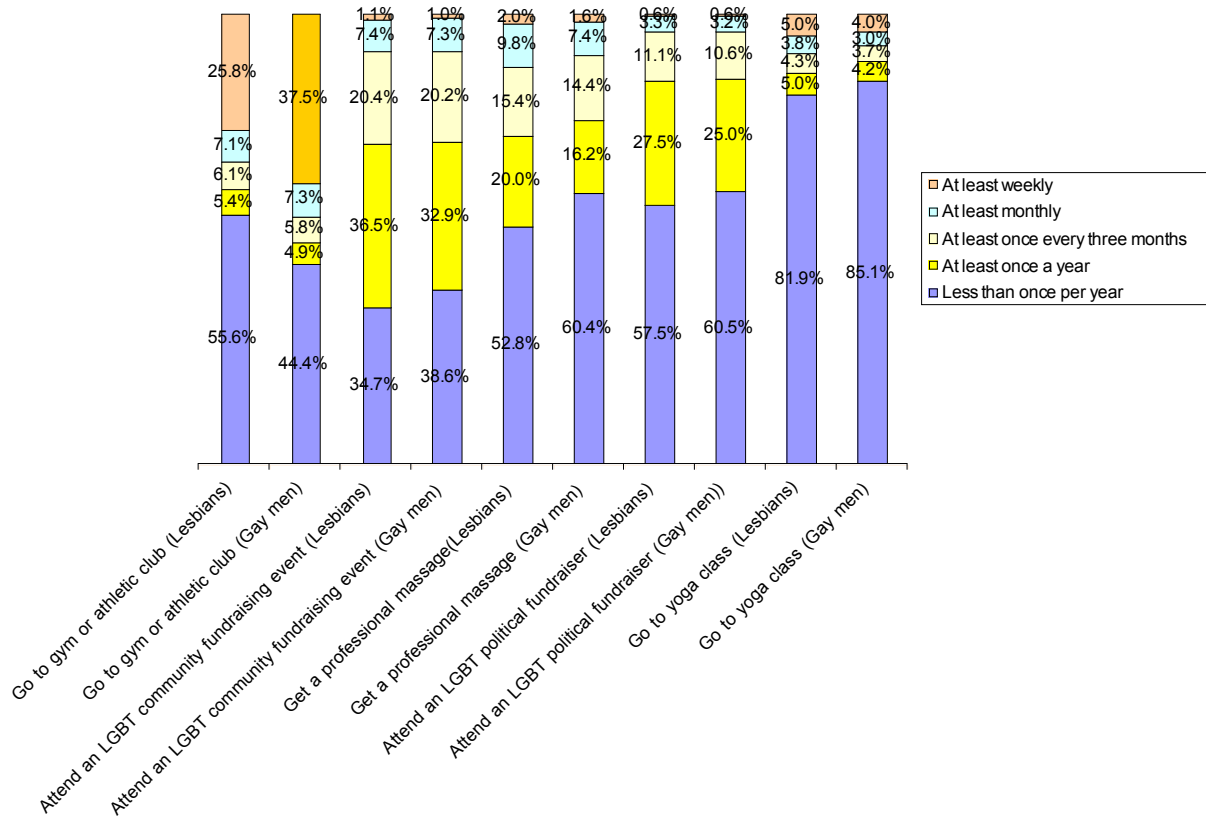
How often do you participate in each of the following types of entertainment activities?



Reflecting on the kind of entertainment they enjoyed, participants were the most likely to say they dined out with friends or enjoyed the outdoors at least weekly or monthly. Perhaps because of their greater tendency to live alone, gay men were more likely than lesbians to say they dined out with friends at least once a week (37% compared to 27%). Consistent with their greater tendency to live outside cities, lesbians were more likely than gay men to report enjoying the outdoors on a weekly basis (41% compared to 33%).

Going out to a bar, club or performance was also relatively popular. Compared to lesbians, gay men were more likely to report weekly or monthly enjoyment of bars or clubs (49% of gay men compared to 31% of lesbians), going out to a movie (40% compared to 29%), or going to a live performance (21% compared to 14%).

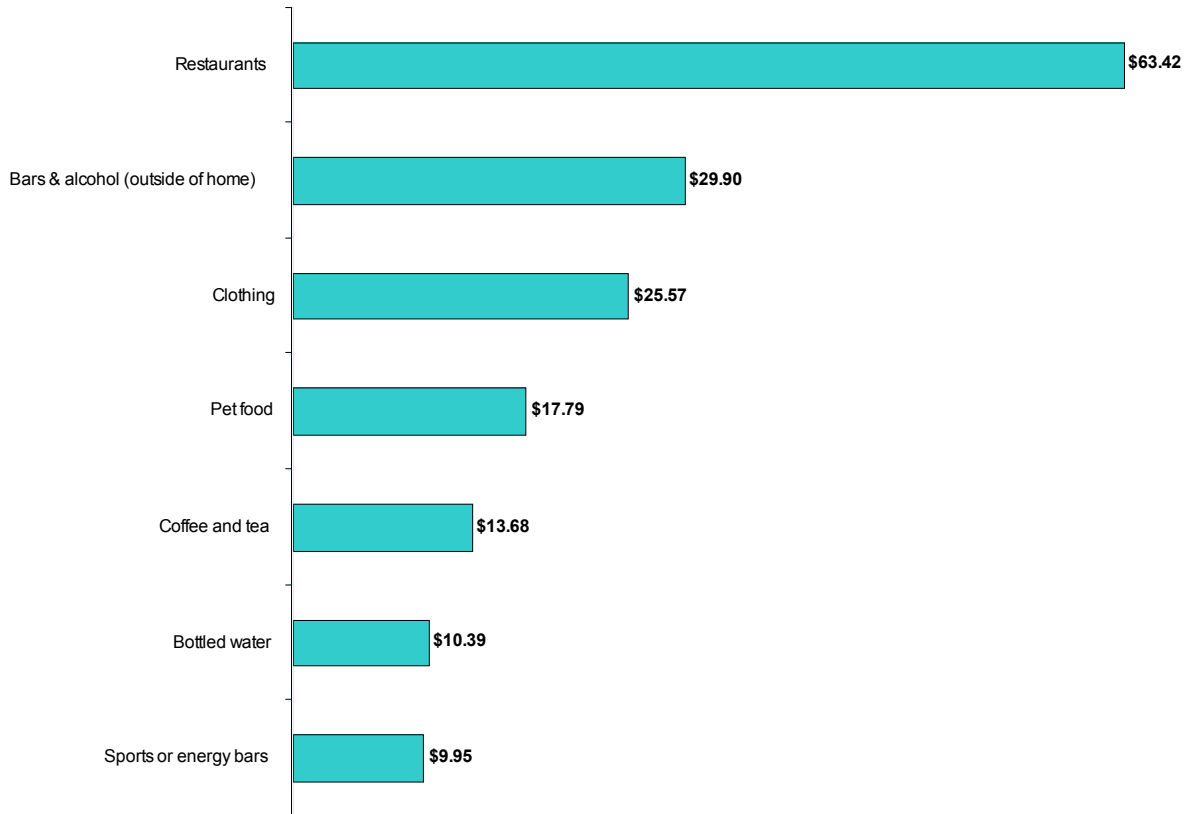
**Participation in Entertainment (continued):  
Gay Men and Lesbians**



Participants reported attending other activities less frequently. About one-quarter of lesbians (26%) and more than a third of gay men (38%) reported going to a gym or athletic club at least once a week. Approximately 65% of lesbians and 61% reported attending LGBT fundraisers at least once a year.

**Restaurant, Alcohol and Other Expenses**

*On the average, how much do you spend **each week** on each of the following? Please enter in whole US Dollars.*

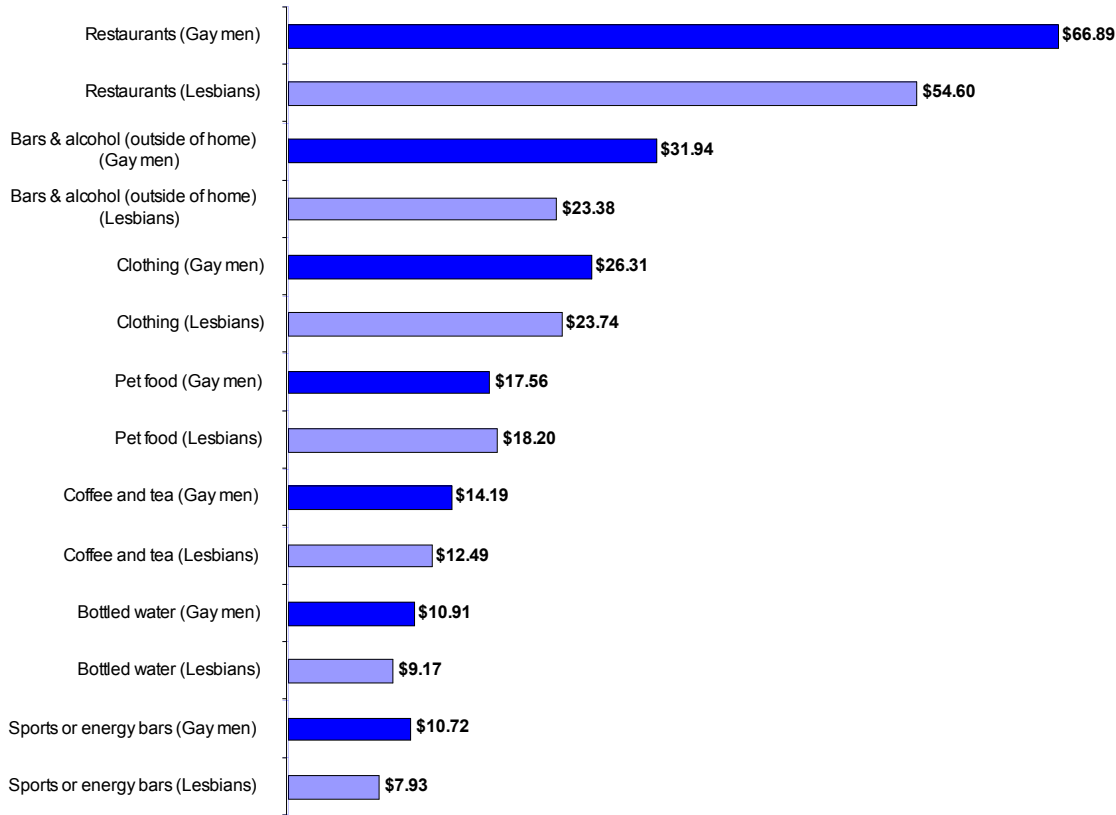


(N = 13,102)

Participants also reported on the amounts they spent on restaurants, bars and alcohol, coffee or tea, or other expenses each week. Restaurant-goers, the biggest spenders, reported spending over \$60 a week on meals. People who went to bars or bought alcohol reported spending about \$30/week, somewhat more than the \$26/week some reported spending on clothing. Those who said they drank coffee or tea said they spent about \$14/week on coffee or tea, and those who said they drank bottled water said they spent about \$10/week on the water.

***Restaurant, Alcohol and Other Expenses:  
Gay Men and Lesbians***

*On the average, how much do you spend each week on each of the following? Please enter in whole US Dollars*



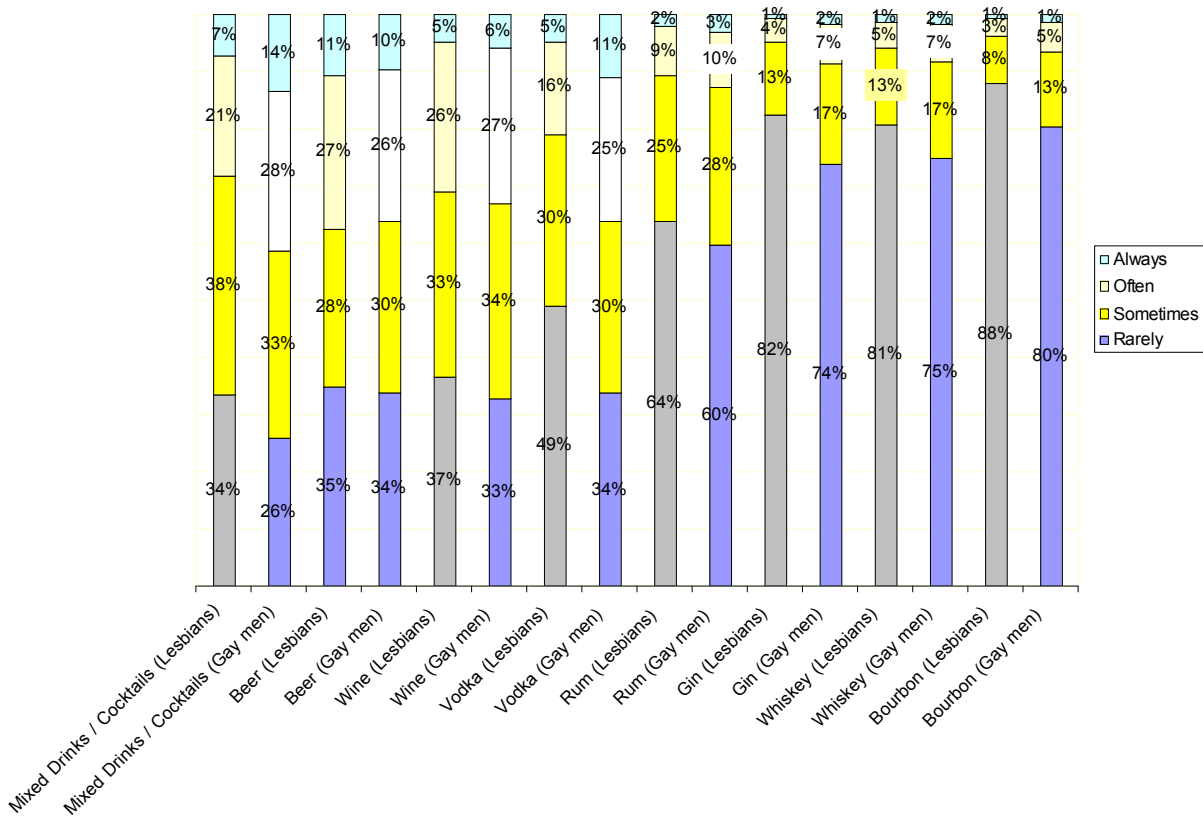
(N = 13,102)

Consistent with gay men more likely to be single and living in urban environments, gay men reported spending more than lesbians in restaurants and bars and alcohol

**Alcohol Consumption**

**Frequency of Alcoholic Beverage Consumption:  
Gay Men and Lesbians**

When you enjoy alcoholic beverages at a bar, restaurant or club, how frequently do you consume [type of beverage]?

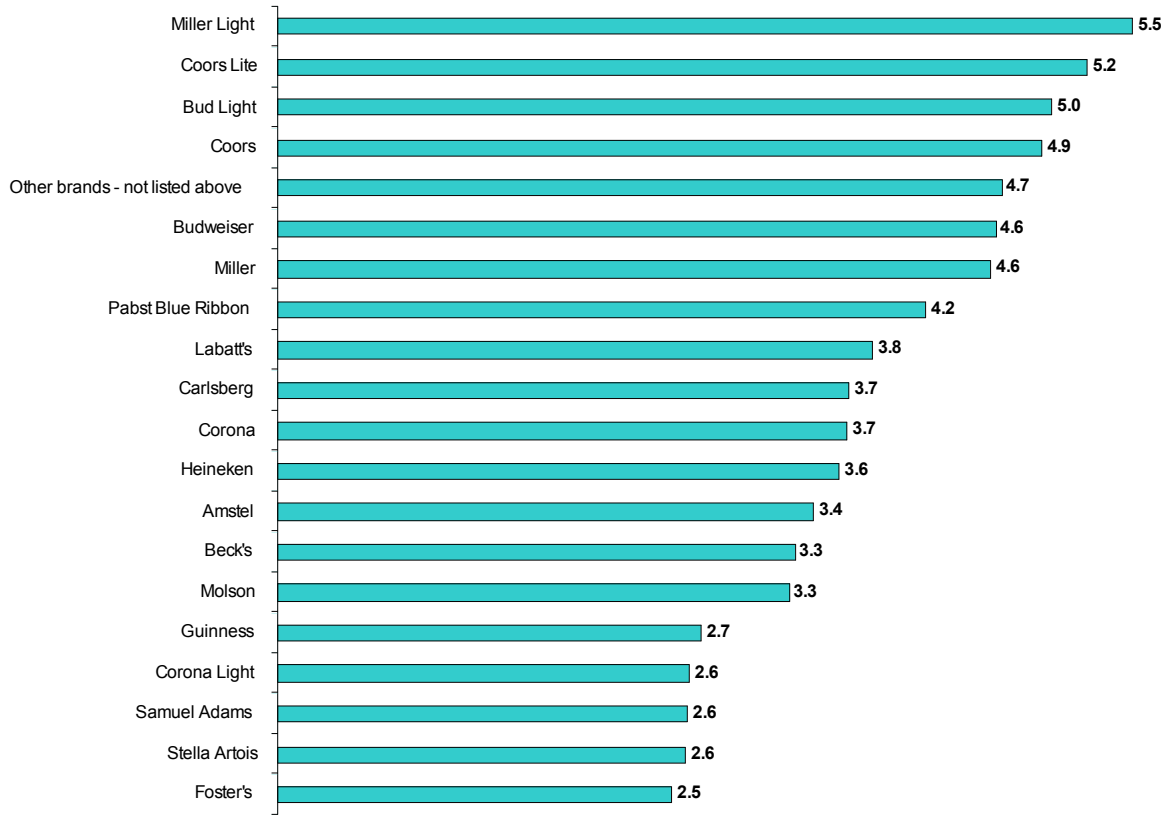


Looking at types of alcohol consumed often and sometimes:

- 55% of lesbians and 56% of gay men drink beer often or sometimes
- 59% of lesbians and 61% of gay men drink wine often or sometimes
- 45% of lesbians and 55% of gay men drink vodka often or sometimes

### Frequency of Drinking Beers, by Brand of Beer

About how many of the following brands' beers have you consumed in the past week? If zero, just leave it blank. If you didn't drink any beer last week, please skip the question.



Participants also reported on how many beers of specific brands they drank per week. They tended to report drinking light beers (such as Miller Light, Coors Light, and Bud Light) the most frequently and that they drank on average between 5 and 6 beers of these brands per week. Coors, Budweiser, Miller, and other brands were also reportedly drunk relatively often.

### ***Number of Alcoholic Beverages Consumed Per Week at Bars and Restaurants***

*How many alcoholic beverages, including beer and wine, do you consume per week at bars and restaurants? (Beverages per week)*

Asked about their weekly consumption of beer and wine at bars and restaurants, about one-third (31%) of 14,657 participants said they don't drink alcohol at bars and restaurants. About 16% each of participants reported drinking one or two drinks at a bar or restaurant per week.

Not counting people who said they didn't drink in bars or restaurants, the average number of drinks that was reportedly consumed in these locations per week was about 5 (Mean = 4.8) with gay men reporting more drinks consumed in bars and restaurants (Mean = 5.0) than lesbians did (Mean = 4.0).



### ***Number of Alcoholic Beverages Consumed Per Week at Home or at Friends' Houses***

*How many alcoholic beverages, including beer and wine, do you consume per week at home or at friend's houses? (Beverages per week)*

As for their weekly consumption of beer and wine at home or at friends' houses, 29% of participants (N = 14,737) also reported not drinking at either place. 13% and 14% respectively of respondents reported drinking one or two alcoholic beverages at home or a friend's house per week.

Not counting people who said they didn't drink in private homes, the average number of drinks that was reportedly consumed in homes per week was about 6 (Mean = 5.9)—somewhat higher for gay men (Mean = 6.1) than for lesbians (Mean = 5.4). In general, both groups said they divided their drinking about equally between public and private locations, but thought they drank a little more at home.

Participants were asked to write in any company or brand in the world they thought are doing an exemplary job of reaching out to the LGBT community. Participants could write in up to three companies. This was an open-ended question with no prompts.

Results were:

The number one brand indicated by LGBT Americans was Absolut.

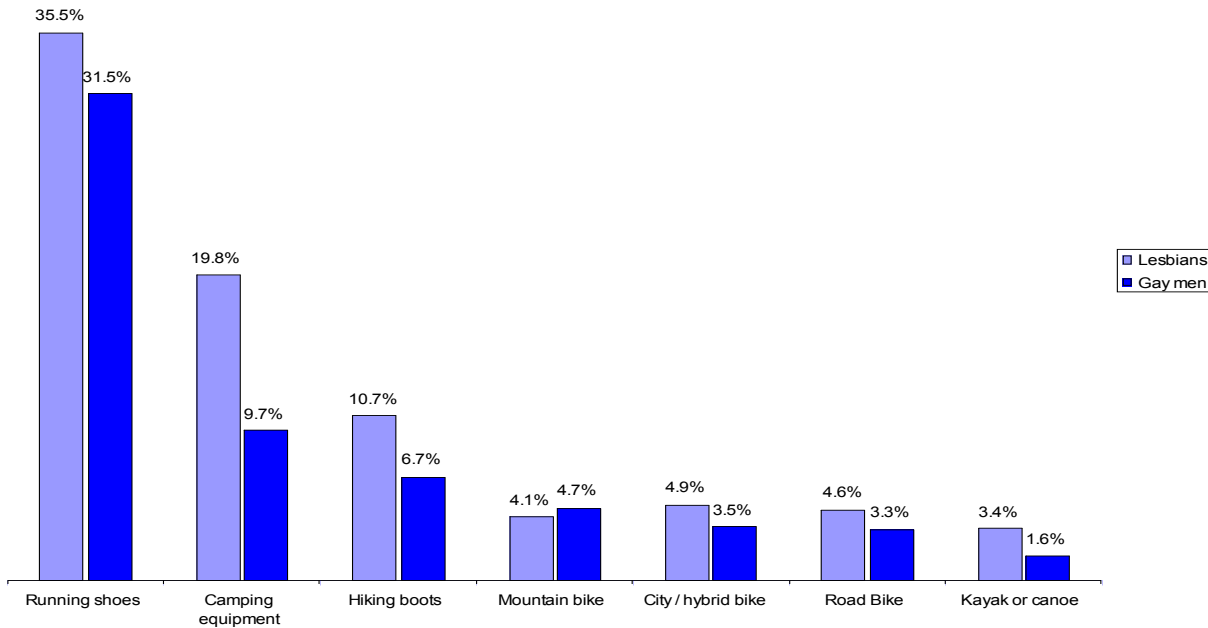
Four brands were indicated by 11 to 15% of survey participants and included Absolut, American Airlines, Budweiser-Anheiser Busch and Subaru.

There was a second tier indicated by 6 to 10% of participants and included American Express, Apple, Disney, IBM, IKEA, Levis, Miller, Orbitz, Southwest Airlines, Travelocity and Wells Fargo.

Other Purchases and Influences on Purchasing

**Purchases of Sports Equipment:  
Gay Men and Lesbians**

Which of the following sports equipment have you purchased in the last 12 months? Check all that apply.

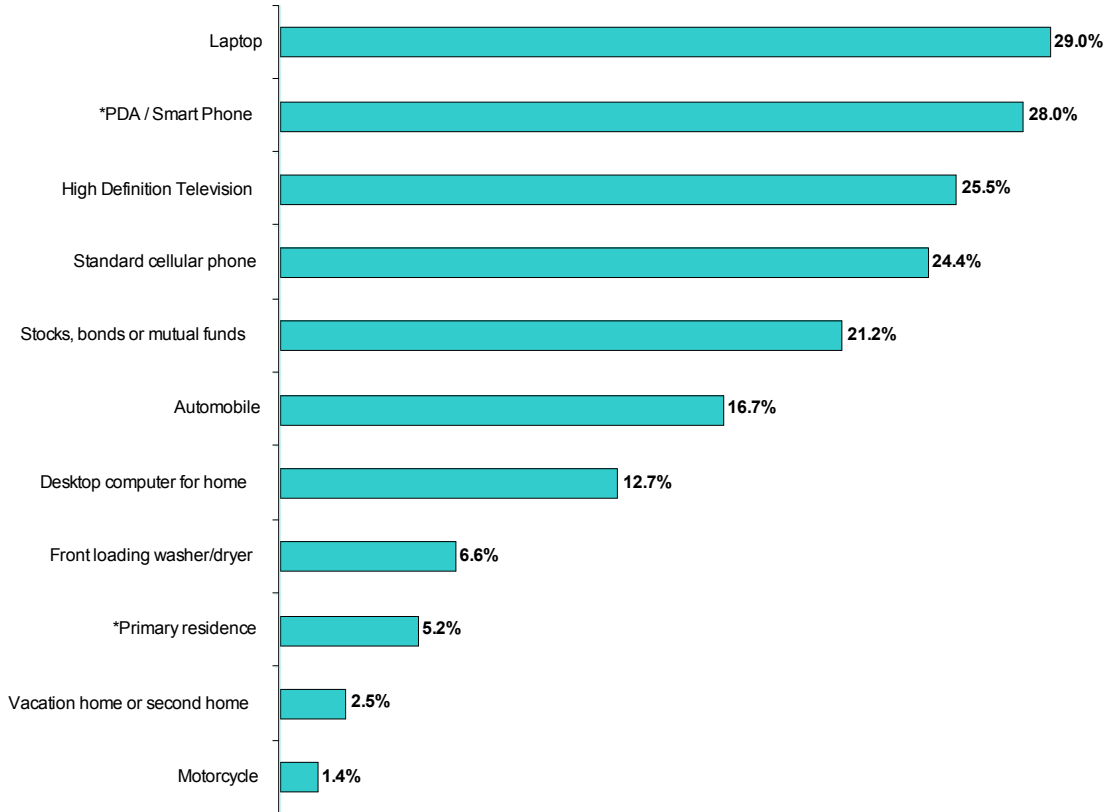


Participants were also asked about other purchases they tended to make. Thinking about purchases of sports equipment in the past year, respondents were most likely to mention buying running shoes (33%). Bikes were the item they said they bought next most commonly (13%), whether mountain bikes (5%), city/hybrid bikes (4%) or road bikes (4%); only 1% said they bought a moped. Others reported buying camping equipment (13%), hiking boots (8%), or a kayak or canoe (2%). Less than 1% of respondents said they bought Alpine skis, mountain climbing gear, or snowboards.

Consistent with lesbians’ reports of being more likely to live in suburban or rural areas than gay men were, they were also more likely than gay men to report buying different kinds of sports equipment in the past year, including running shoes (36% compared to 32%), camping equipment (20% compared to 10%), hiking boots (11% compared to 7%), city/hybrid bikes (5% compared to 4%) road bikes (5% compared to 3%), or a kayak or canoe (3% compared to 2%).

**Major Purchases**

*Which of the following major purchases have you made in the last twelve months? Check all that apply.*

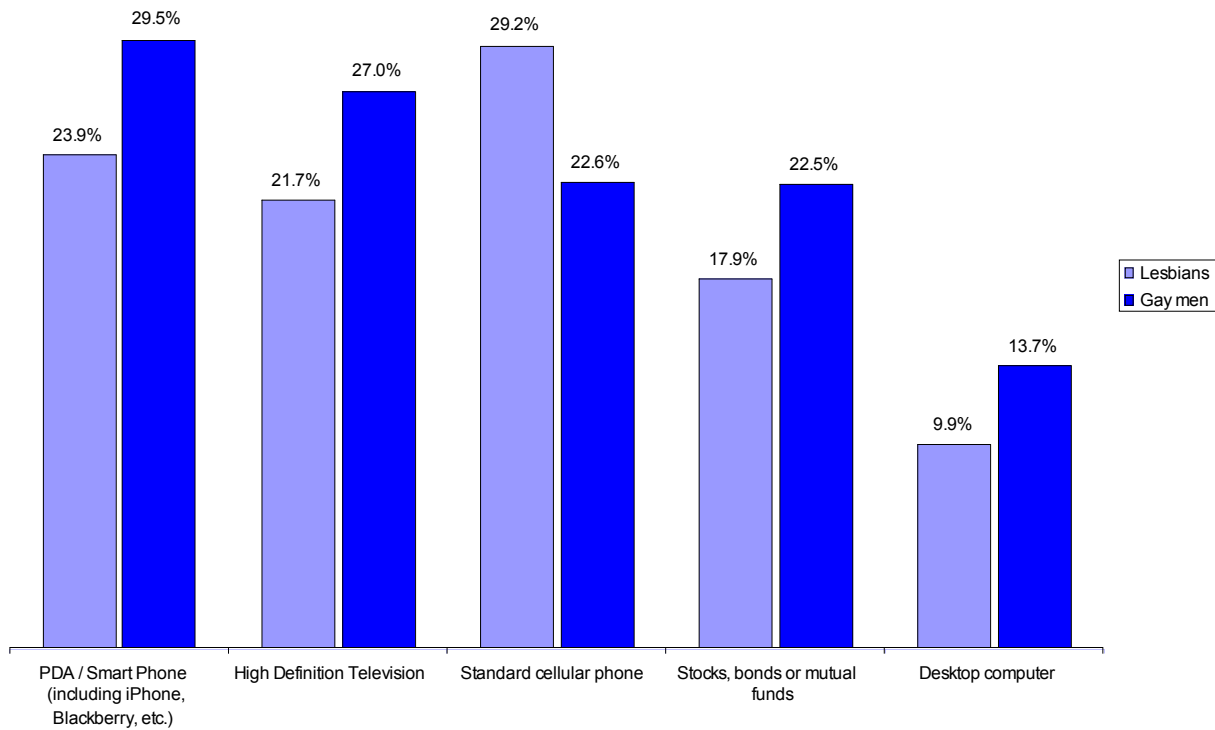


(N = 11,431)

As for other purchases made in the past 12 months, survey respondents were especially likely to mention buying electronic equipment, such as laptop computers (29%), PDA/Smart phones (28%), high-definition televisions (26%) or standard cellular phones (24%). About one-fifth (21%) also said they bought stocks, bonds or mutual funds in the past year. Relatively few said they bought a car (17%) or a home/primary residence (5%) within the last year.

**Major Purchases:  
Gay Men and Lesbians**

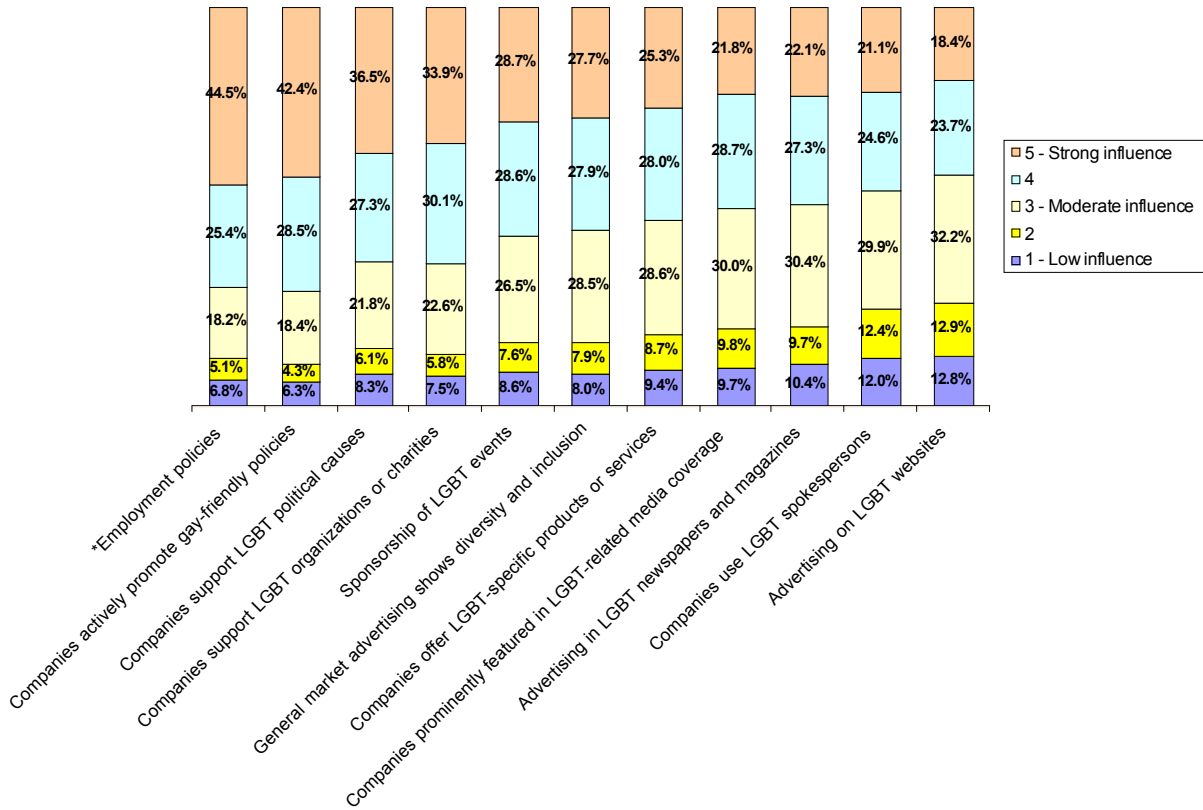
*Which of the following major purchases have you made in the last twelve months?*



Gay men were more likely than lesbians to report past-year purchases of a PDA/Smart phone (30% compared to 24%), or high-definition TV (27% compared to 22%). Lesbians were more likely to report buying a standard cellular phone (29% compared to 23%).

### **Company Practices as Influences on Purchasing Decisions**

*When corporations outreach to the LGBT community in the following ways, what has the biggest impact on influencing your purchasing decisions?*



Participants also reported on company practices they thought had the most influence on their purchasing decisions. They were the most likely to mention the strong influence of companies having fair employment practices (45%)—such as non-discrimination in hiring or recognition of domestic partners—as well as gay-friendly policies (42%). Participants were almost as likely to mention the strong influence of companies supporting LGBT political causes (37%), LGBT organizations or charities (34%) or LGBT events (29%).

Participants tended to note the moderate influence of advertising practices, including mainstream advertising that demonstrates diversity and inclusion (29%), companies offering LGBT-specific products or services (29%), companies being featured in LGBT media (30%) or advertised there (30%), and companies using LGBT spokespersons (30%) or advertising on LGBT websites (32%). Lesbians were more likely than gay men to say that company policies and practices had a strong influence on their purchase decisions.

### ***Boycotted Any Company***

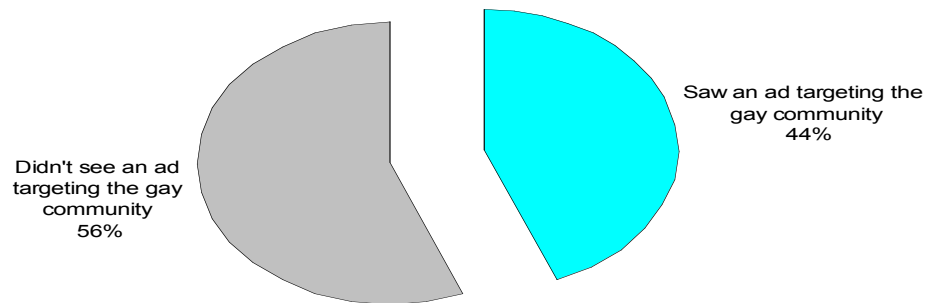
*In the past 12 months, have you boycotted any company because they supported anti-LGBT causes?*



Only 33% of gay men and lesbians reported having boycotted a company in the past 12 months.

### ***Saw an Advertisement Targeting the LGBT Community***

*Do you remember seeing an advertisement within the last week that specifically targeted the LGBT community?*

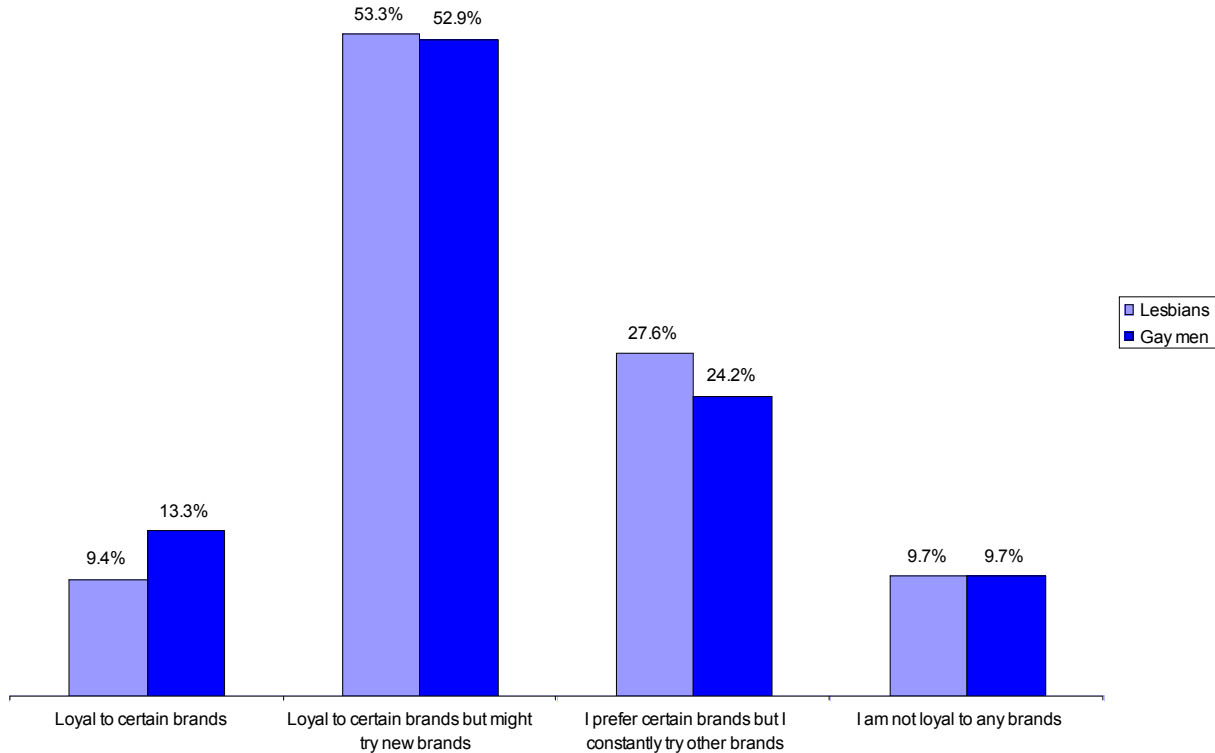


Although respondents had reported the moderate influence of advertising sensitive to the LGBT community, the majority of respondents (56%) reporting on the past week could not remember having seen an ad that targeted the gay community. Lesbians were more likely to say they had not seen such an ad (66%) than gay men were (52%).



### Loyalty to Brands: Gay Men and Lesbians

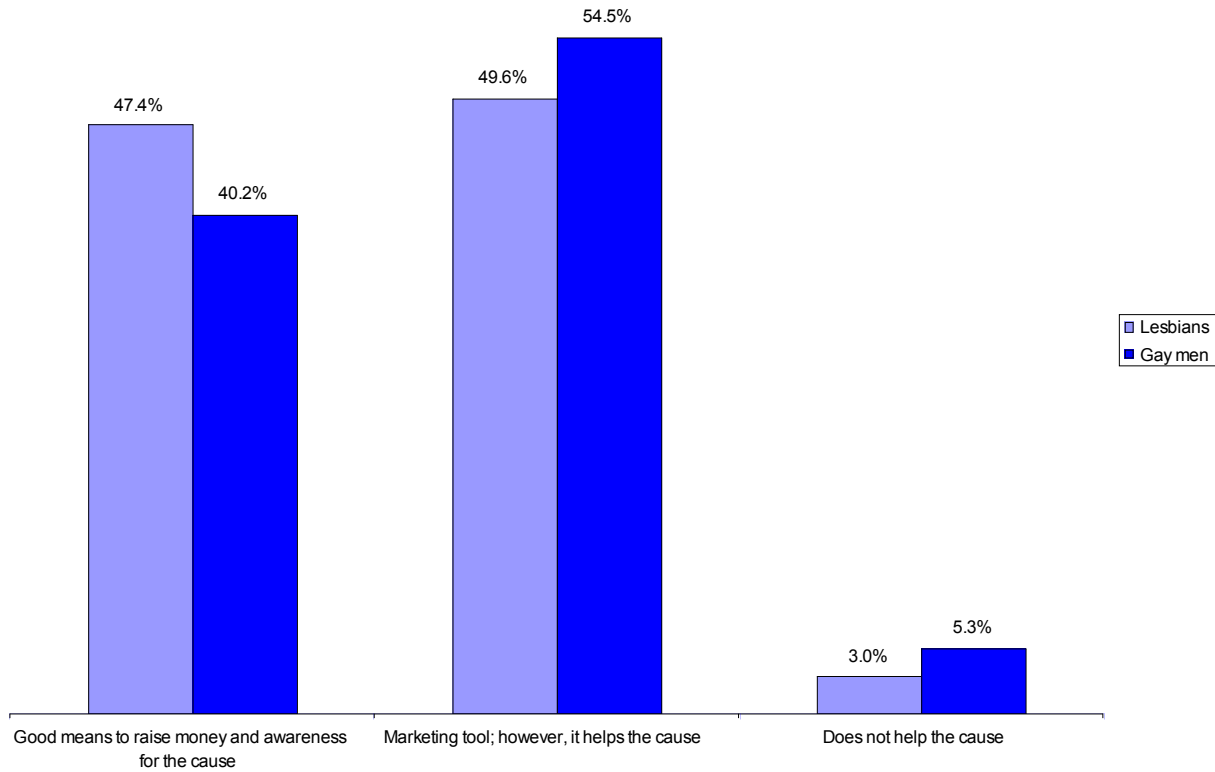
*When thinking about your purchasing behavior, would you consider that you are...*



As for brand loyalty, more than half (53%) of respondents said they were loyal to certain brands but might try new brands. Another one-quarter said they preferred certain brands but constantly tried new brands. About 12% of respondents reported consistent brand loyalty.

**Opinion of Cause-Related Promotions:  
Gay Men and Lesbians**

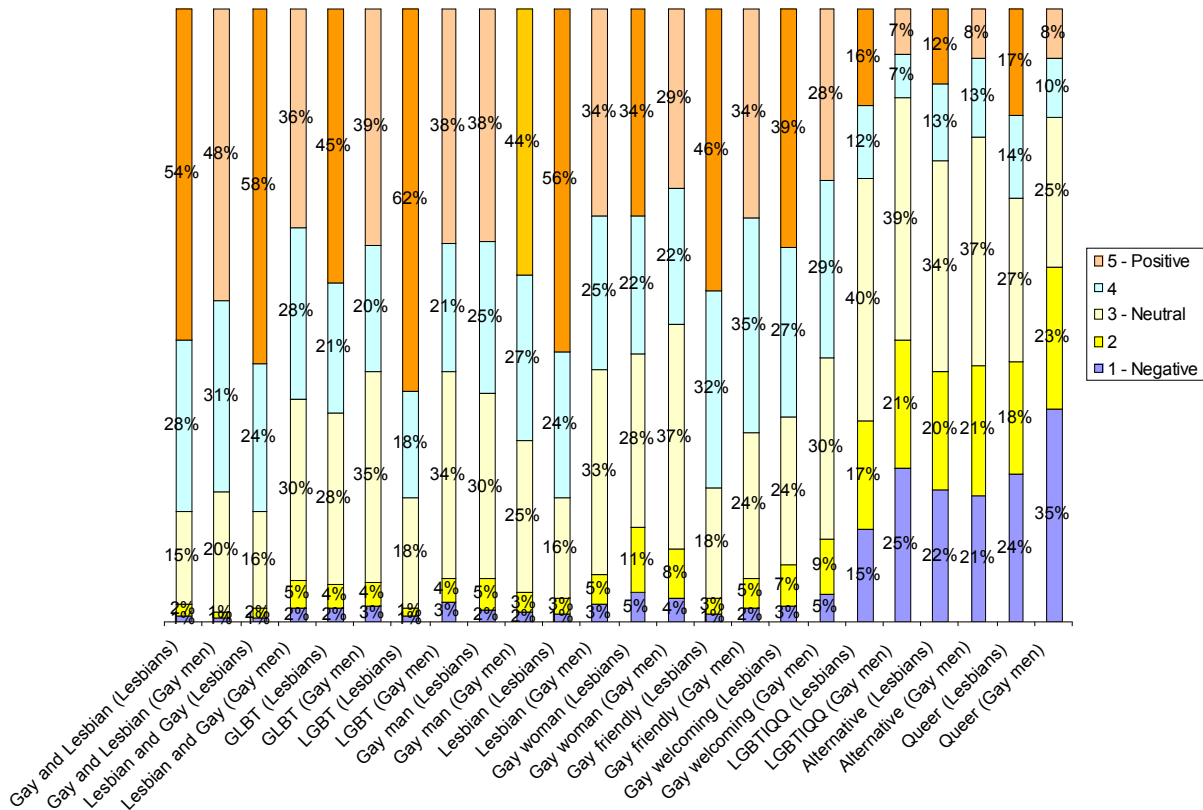
*What is your opinion about cause-related promotions such as Pink Ribbon, LiveStrong, Product Red (AIDS), American Heart Association?*



With regard to cause-related marketing, the greatest percentage of respondents (53%) viewed it as a marketing tool even if it did help a cause. Gay men were more likely to express such an opinion (55%) than lesbians were (50%). The next largest group of respondents (42%) saw cause-related marketing as a good way to raise money and awareness for a cause, with lesbians being more likely to endorse such views (47%) than gay men were (40%).

### Views of Marketing Terms: Gay Men and Lesbians

The following terms are often used in marketing, to either describe the community or outreach to the community. Please rate how you feel about each term when you see them in advertising.



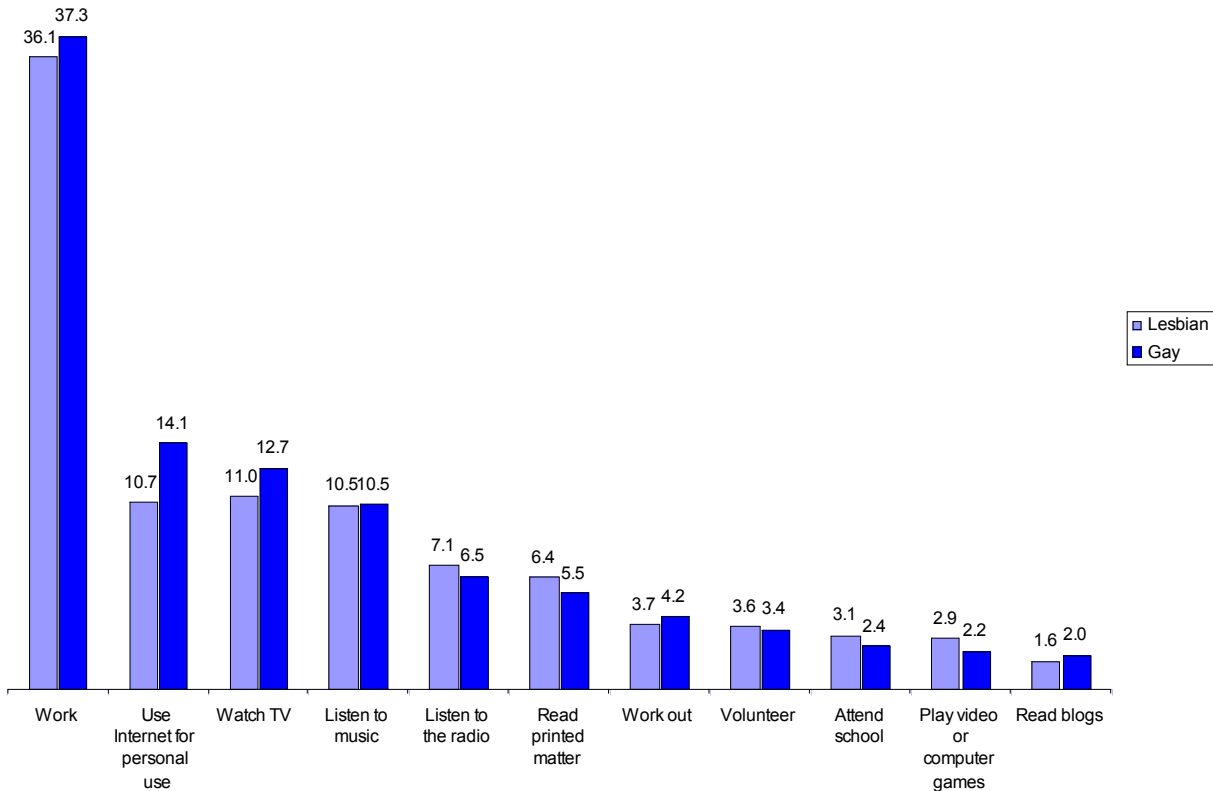
For participants as a whole, preferred marketing terms to describe the gay and lesbian community were “Gay and lesbian” (Mean = 4.3), “Lesbian and gay” (Mean = 4.0), “LGBT” (Mean = 4.0) and “Gay-friendly” (Mean = 4.0). When comparing LGBT vs. GLBT, women strongly prefer LGBT, but the men view the two equally positive.

While most terms commonly used in gay and lesbian marketing campaigns were viewed positively, the terms Queer, Alternative, LGBTIQQ were viewed neutral to negative.

Media Preferences

**Hours Per Week of Activities:  
Gay Men and Lesbians**

How many hours per week do you spend ...? (Note: please put the true number of hours you spend.)

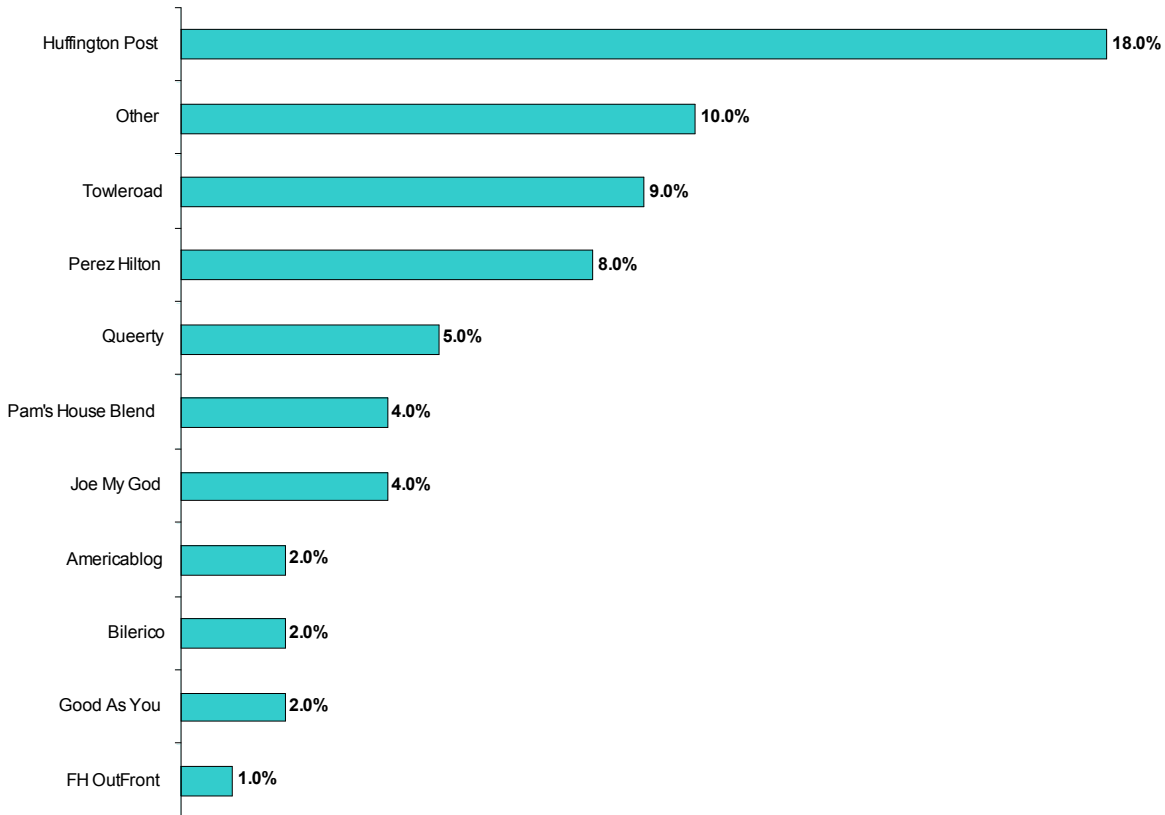


(N = 13,595)

Participants were next asked about their consumption of media, including how many hours they spent involved in different activities per week. Compared to working, at which participants said they spent the most time (Mean = 37 hours/ week), the activities participants reported doing the next most often included using the Internet for personal use (Mean = 13.1 hours/week), watching TV (Mean = 12.2 hours/week), listening to music (Mean = 10.5 hours/week), listening to the radio (Mean = 6.7 hours/week), reading (Mean = 5.8 hours/week), and working out (Mean = 4.0 hours/week). Compared to lesbians, gay men tended to report a greater number of hours per week spent using the Internet for personal use (Mean = 14 hours/week compared to 11) and watching TV (Mean = 13 hours/week compared to 11).

***Blogs Read Monthly***

*Which blogs do you read at least monthly? Skip if you do not read blogs.*



With regard to blogs they read at least monthly, participants were most likely to indicate reading the Huffington Post (18%), other blogs (10%), Towleroad (9%), and Perez Hilton (8%).

### ***Social Networking Sites Visited At Least Monthly***

*Do you visit use any of these social networking websites at least once a month? Mark all that apply. Skip if you do not visit any of these sites.*

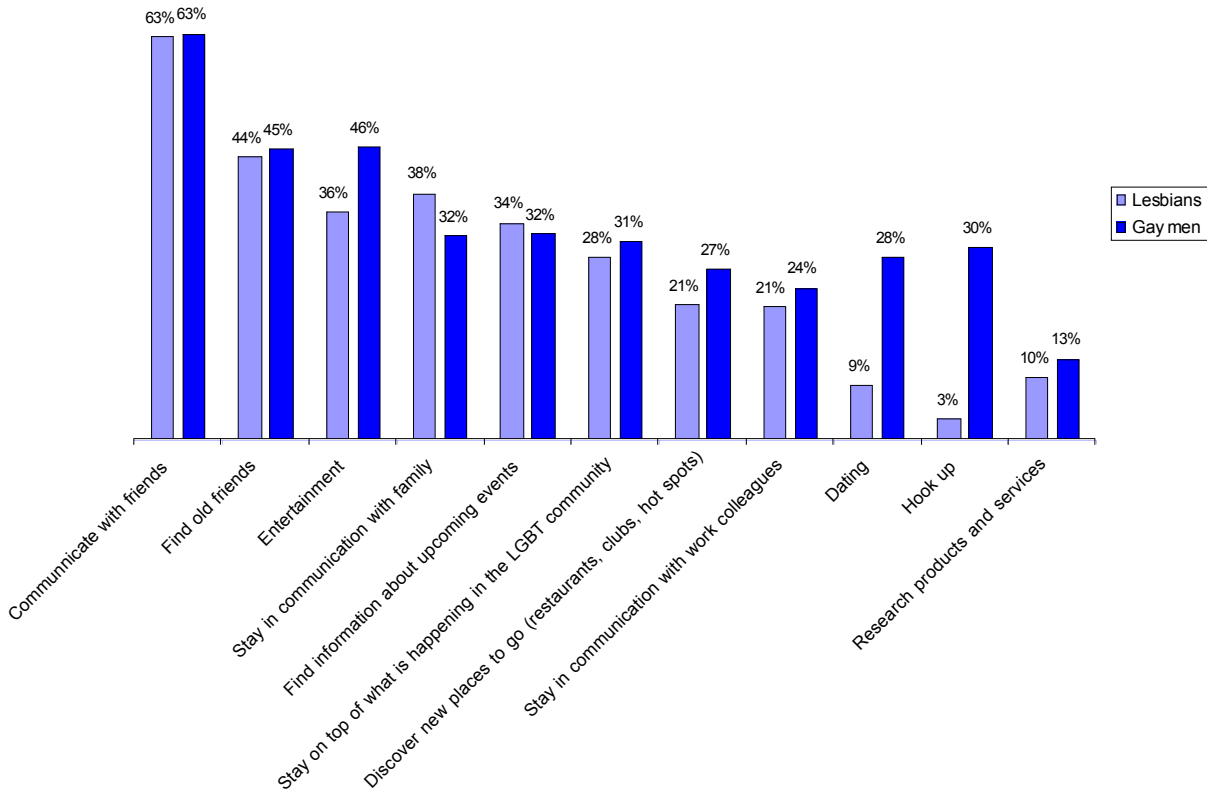
Facebook was the most popular social networking site, with 66% of participants saying they logged on to the site at least once a month, and 25% indicated MySpace. A little under one-fifth of participants said they visited LinkedIn (19%) or Twitter (18%) at least monthly.

Lesbians were more likely than gay men to say that they visited Facebook (69% compared to 66%) or Twitter (20% compared to 17%).

Note that LGBT-specific social media sites such as gay.com and Manhunt were also asked during the survey, but not reported here because some of these sites have been used during recruitment of survey participants, making comparisons with mainstream social media sites less fair. This information was made available to the media companies assisting with the recruitment.

**Motivation to Visit Social Networking Sites:  
Gay Men and Lesbians**

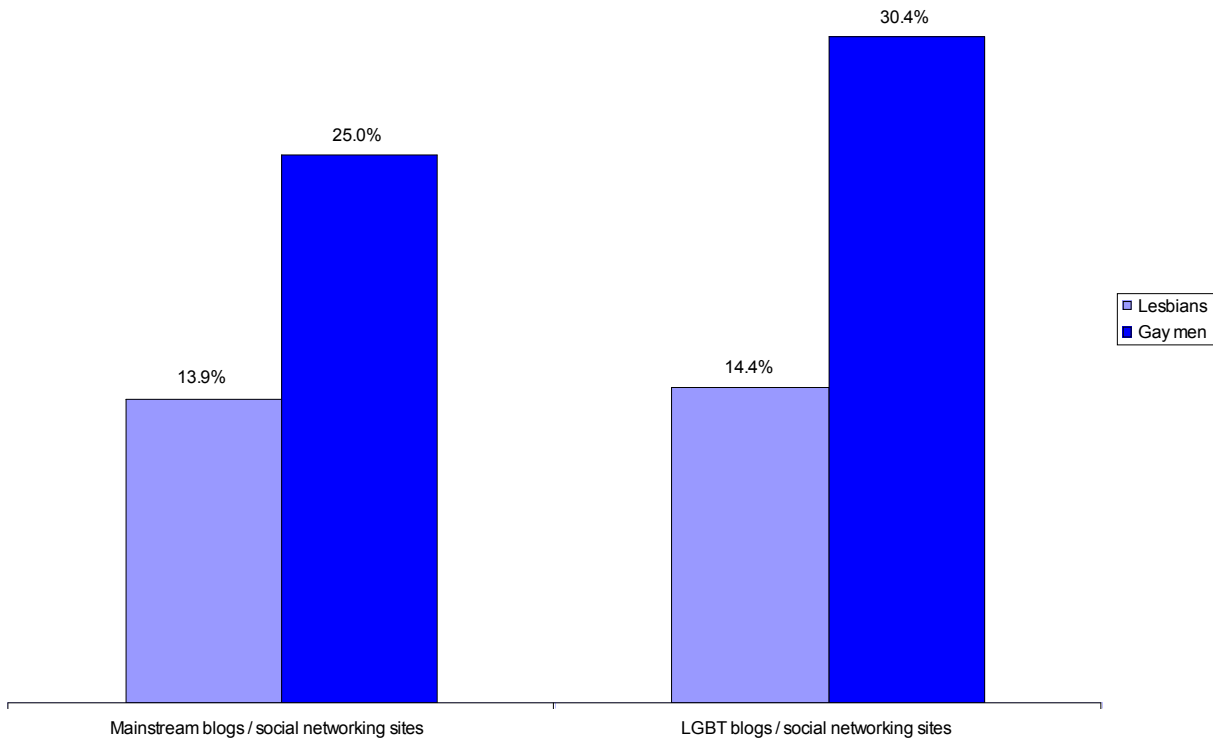
*What is your motivation to use social networking sites? Mark all that apply.*



In general, participants said they used social networking sites to socialize, whether to stay in touch with friends (63%), find old friends (45%), for entertainment (43%), or to stay in touch with family (34%). Finding information—for example, about upcoming events (32%), the LGBT community (30%), or new places to go (25%)—was the next most common motivation. About one-quarter also reported motivations to date (23%) and hook up (22%). Using the sites to research products and services was noted by another 12% of participants. Compared to lesbians, gay men tended to report using social networking sites more for entertainment (46% compared to 36%), and discovering new places to go (27% compared to 21%). They were also much more likely than lesbians to report using the sites for dating (28% compared to 9%) or to hook up (30% compared to 3%). In contrast, lesbians were more likely than gay men to say they used the sites to network with family (38% compared to 32%).

### Responded to Ads on Blogs or Social Networking Sites: Gay Men and Lesbians

In the past month, have you responded to any ads posted on blogs or social networking sites?

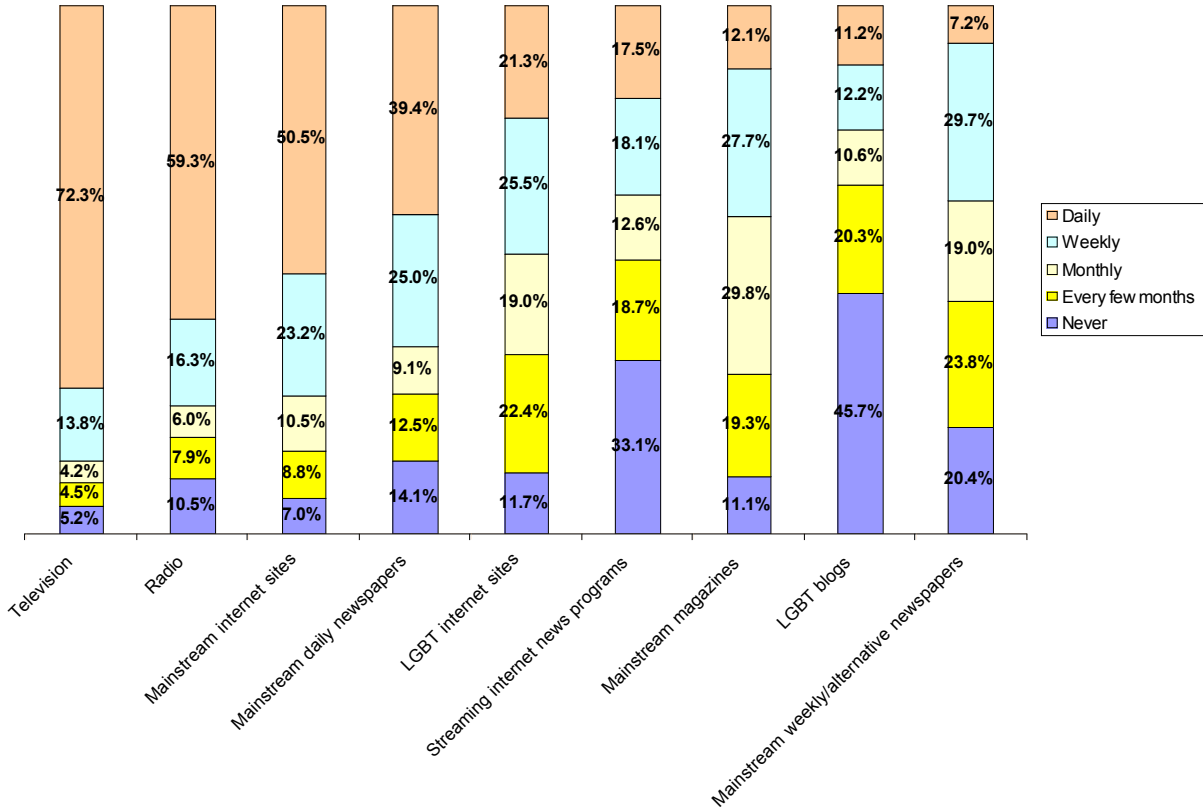


Gay men were also more likely to report responding to ads on mainstream blogs/social networking sites (25%) or on LGBT blogs/social networking sites (39%) than lesbians were (each 14%).



**Frequency of Media Consumption**

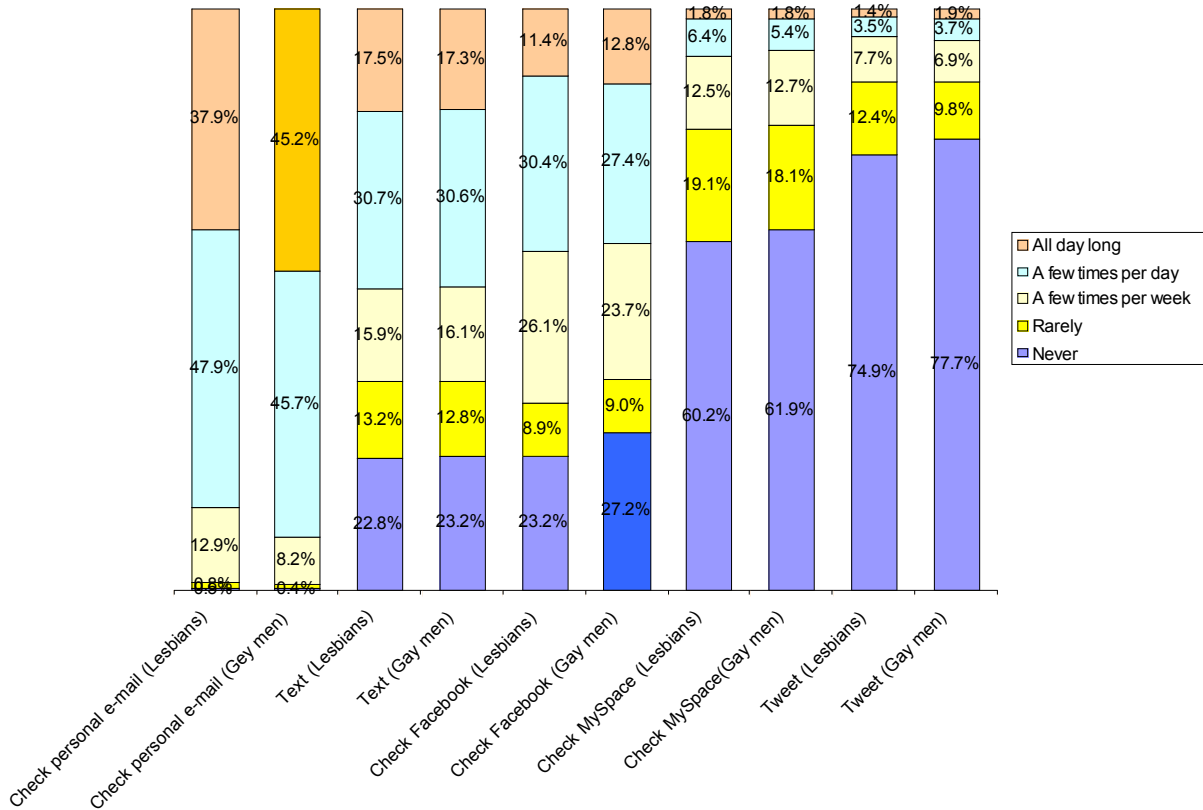
*How often do you read, view or listen to ...*



In general, the media that participants were most likely to say they turned to on a daily basis were television (72%), the radio (59%), mainstream Internet sites (51%) and mainstream daily newspapers (39%). The fewest participants (7%) said they read blogs daily.

**Frequency of Electronic Communication:  
Gay Men and Lesbians**

*How often do you...*



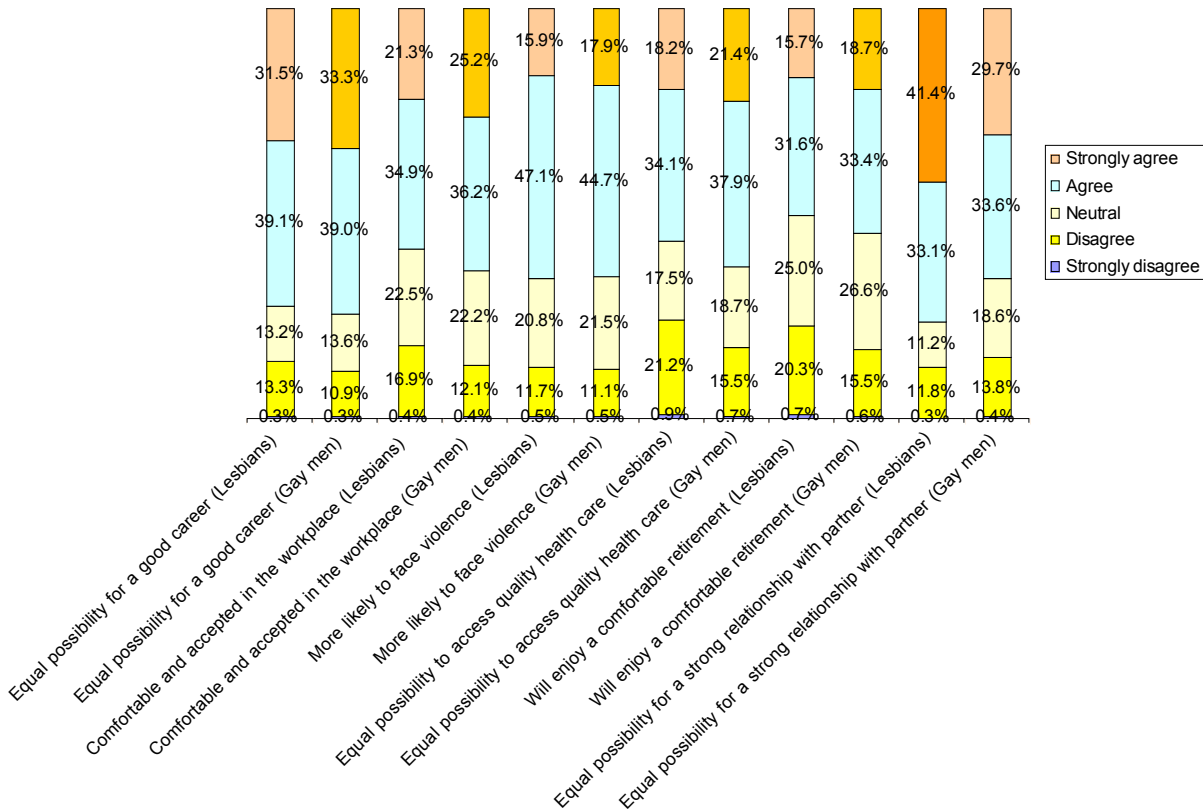
As for use of electronic communication, participants reported being most likely to check e-mail a few times a day (46%), to text a few times a day (31%), and to check Facebook a few times a day (28%). In general, they said they only rarely checked MySpace (61%) or tweeted (77%).

A greater percentage of gay men (45%) than lesbians (38%) said they checked their e-mail all day long. Lesbians reported greater use of Facebook than gay men did, with only 23% saying they never used it, compared to 27% of gay men. Gay men and lesbians did not differ in the overall frequency with which they reported that they texted, checked MySpace, or tweeted.

Lifestyle Issues

Perceptions of Gay Life Compared to Straight Life: Gay Men and Lesbians

Compared to your straight friends, family and colleagues, do you...

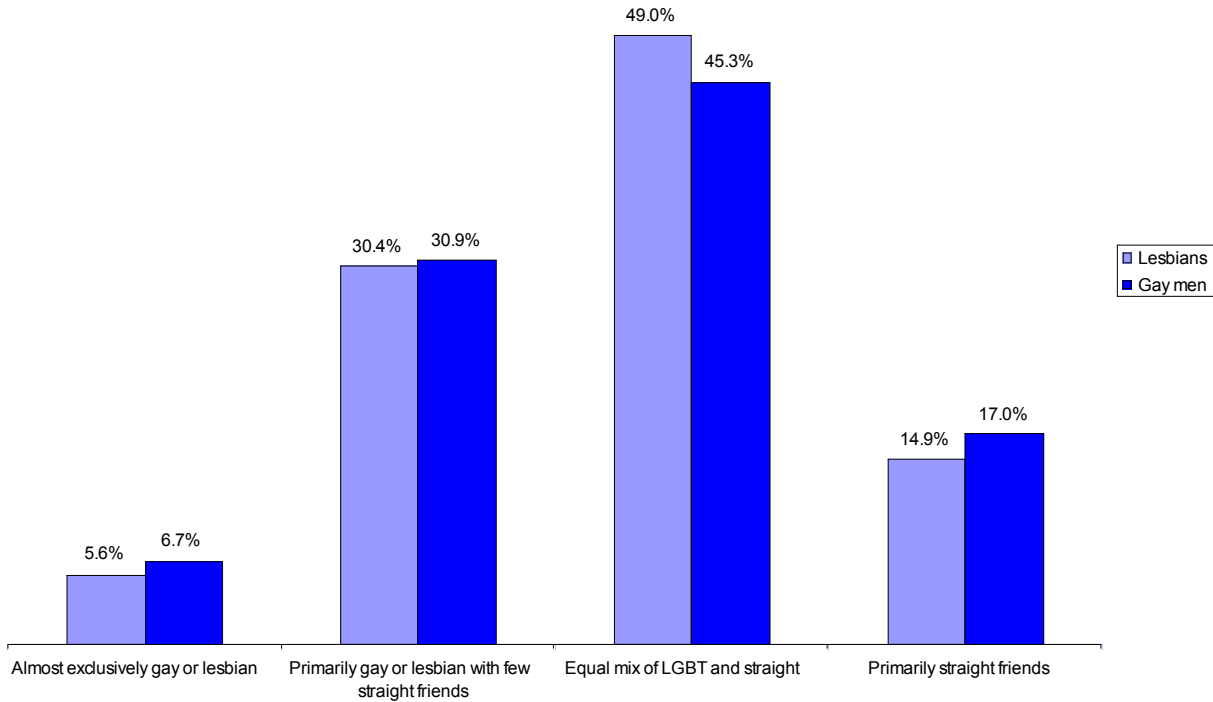


In general, the majority of participants agreed that compared to their straight friends, family and colleagues, they had equal possibilities for a good career, and to feel comfortable and accepted in the workplace. However, although they agree with the statement, it was split almost equally between agree, and strongly agree.

Approximately two-thirds of participants agreed that they'd be more likely to face violence than straight people they knew.

**Mix of Gay and Straight Social Contacts and Friends:  
Gay Men and Lesbians**

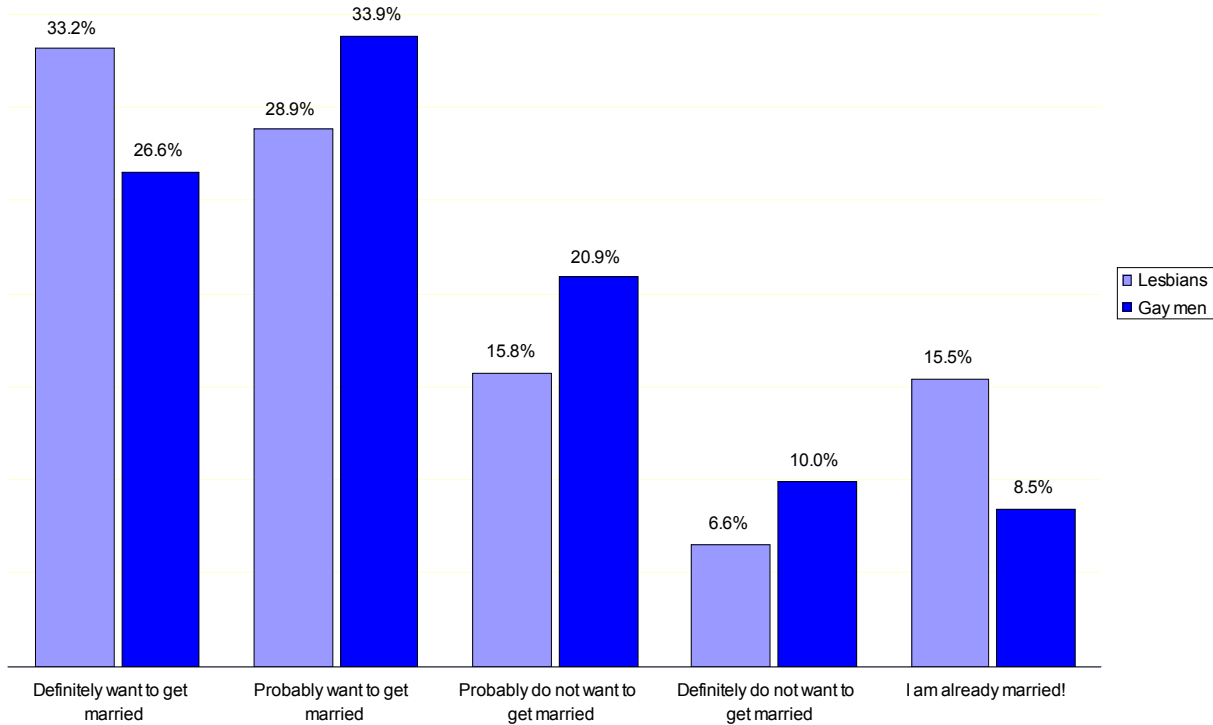
*Your social contacts and close friends are...*



The greatest percentage of participants (46%) said they had an equal mix of gay and straight contacts and friends. About one-third (31%) of participants said their contacts and friends were primarily gay or lesbian with only a few being straight.

**Wish to Marry in the Future:  
Gay Men and Lesbians**

*In the future, do you...*

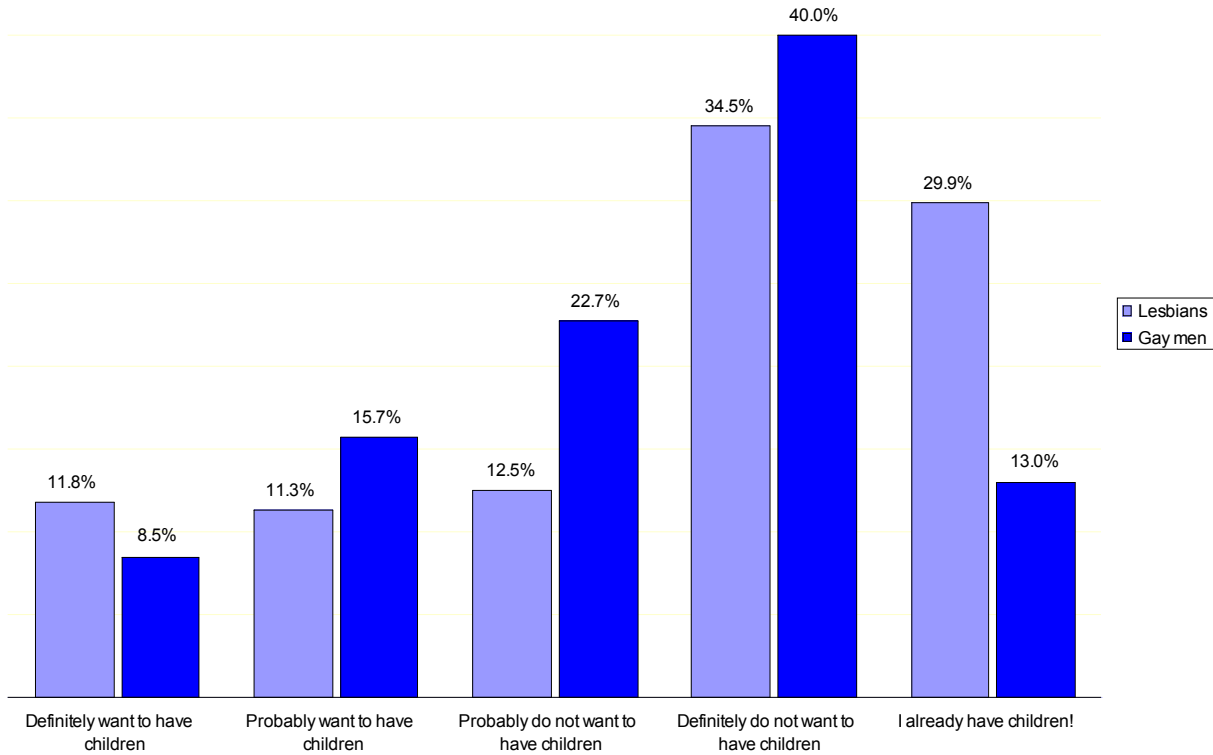


Almost three-quarters (72%) of participants in the study reported positive views of getting married, saying that they probably wanted to get married (33%), definitely wanted to get married (29%), or were already married (10%).

Lesbians were more likely than gay men to say they definitely wanted to marry (33% compared to 27%) or were already married (16% compared to 9%).

**Wish to Have Children in the Future:  
Gay Men and Lesbians**

*In the future, do you...*

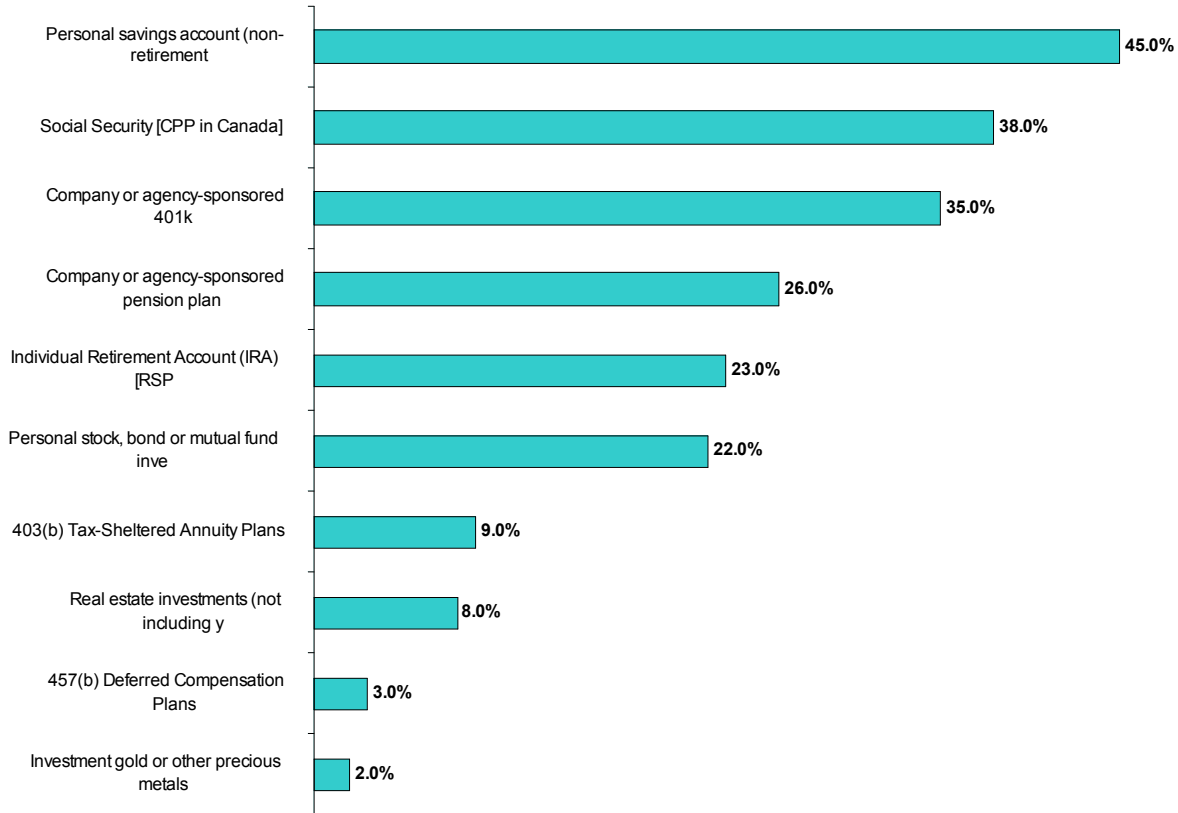


However positively gay men and lesbians felt about marrying, 39% said they definitely did not want to have children. A greater percentage of lesbians than gay men said they definitely wanted to have children (12% compared to 9%) or already had them (30% compared to 13%).

**Financial Activity**

***Retirement Plans and Saving Vehicles***

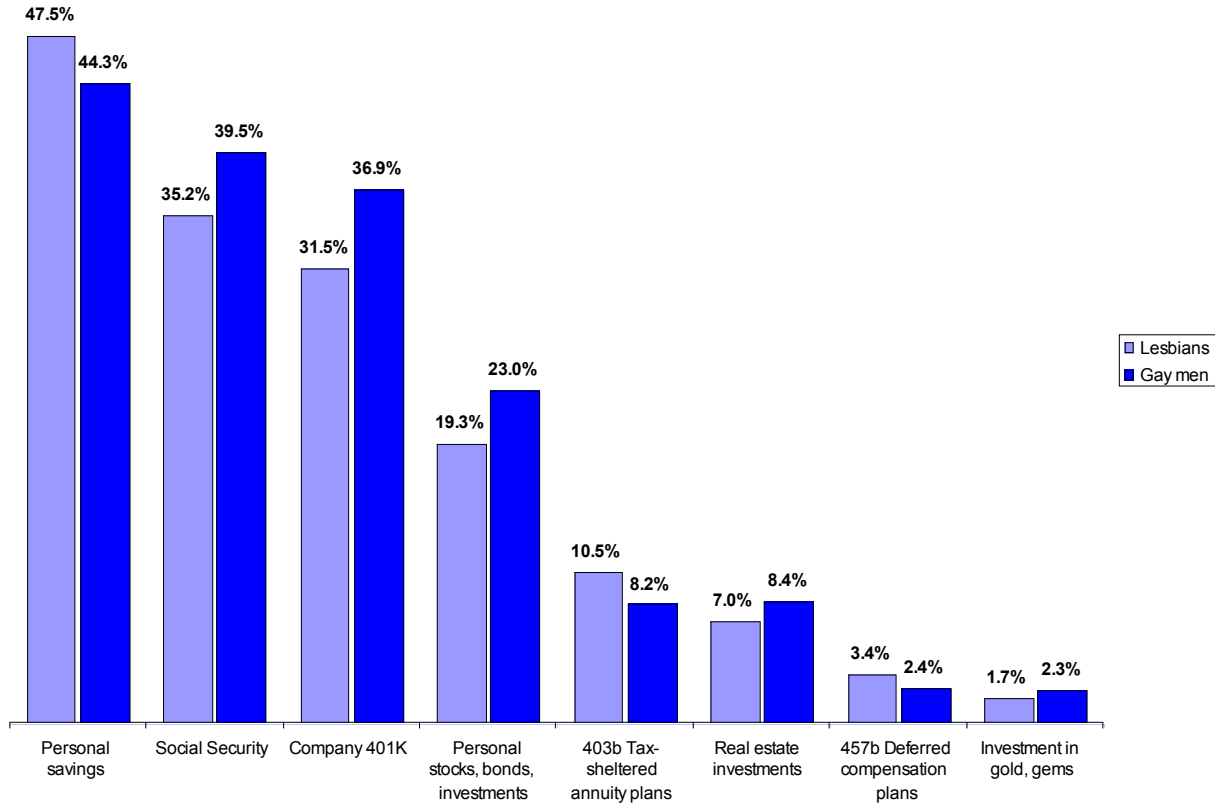
*To which of the following types of retirement plans and other savings vehicles do you regularly contribute? Please mark all that apply.*



As for retirement plans and savings vehicles, participants were most likely to say they regularly contributed to personal savings accounts (45%), Social Security (38%), or company-sponsored 401k retirement accounts (35%). Somewhat fewer participants mentioned contributions to company pension plans (26%), Individual Retirement Accounts (23%), or personal stock, bond or mutual fund investments in taxable non-retirement accounts (22%). Less than 10% said they put money in other types of savings plans or investments.

**Retirement Plans and Saving Vehicles:  
Gay Men and Lesbians**

To which of the following types of retirement plans and other savings vehicles do you regularly contribute? Please mark all that apply.

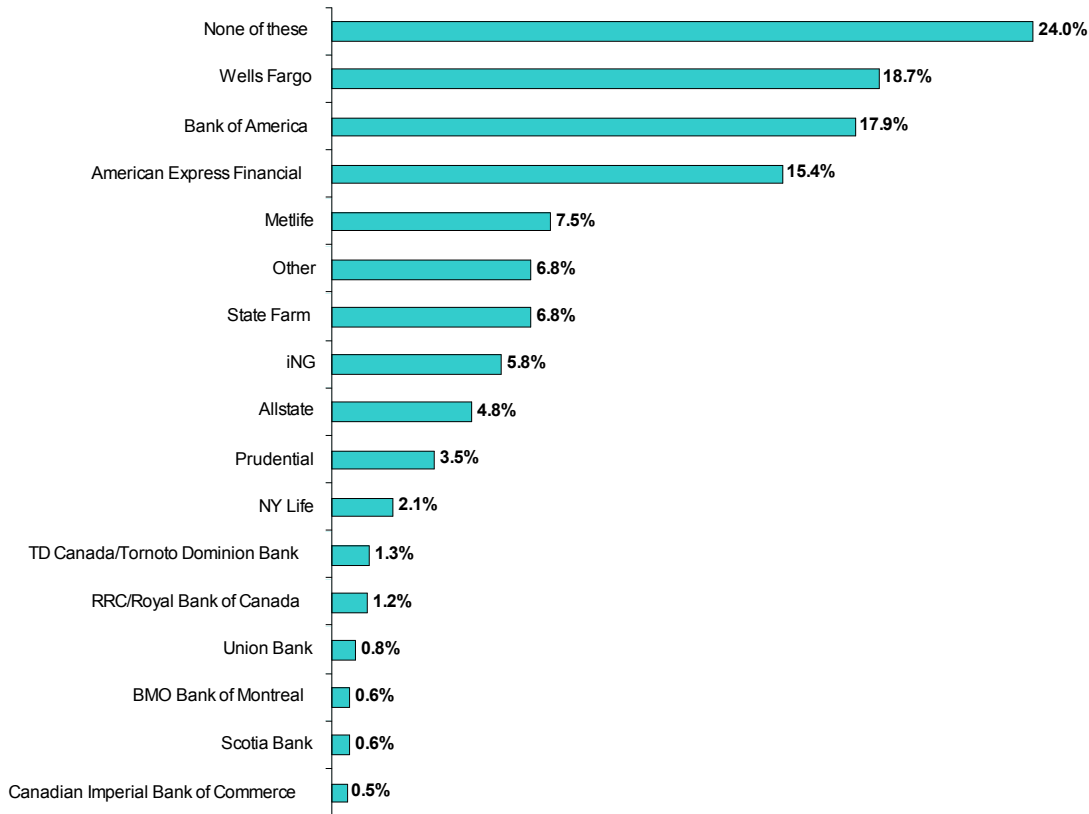


There were no major differences noted between gay men and lesbians on how they plan for retirement.



**Financial Service Brands  
Most Supportive of the LGBT Community**

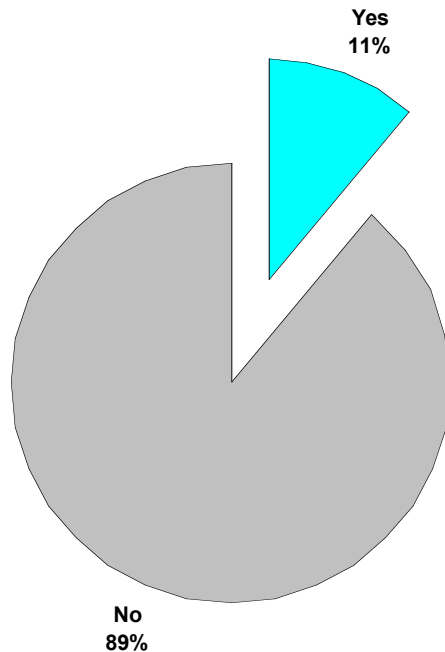
*From the list below, please check the financial services companies that you feel are the most supportive of (sponsorships, employment policies, etc.) or involved with (advertising, etc.) the LGBT community. Check all that apply.*



This survey only reported a few financial institution brands, so this survey should not be interpreted as a just comparison of financial services brands; but of those brands surveyed, Wells Fargo (19%), Bank of America (18%), American Express Financial scored the best.

**Selected a Financial Services Company  
Based on Its Gay-Friendly Reputation**

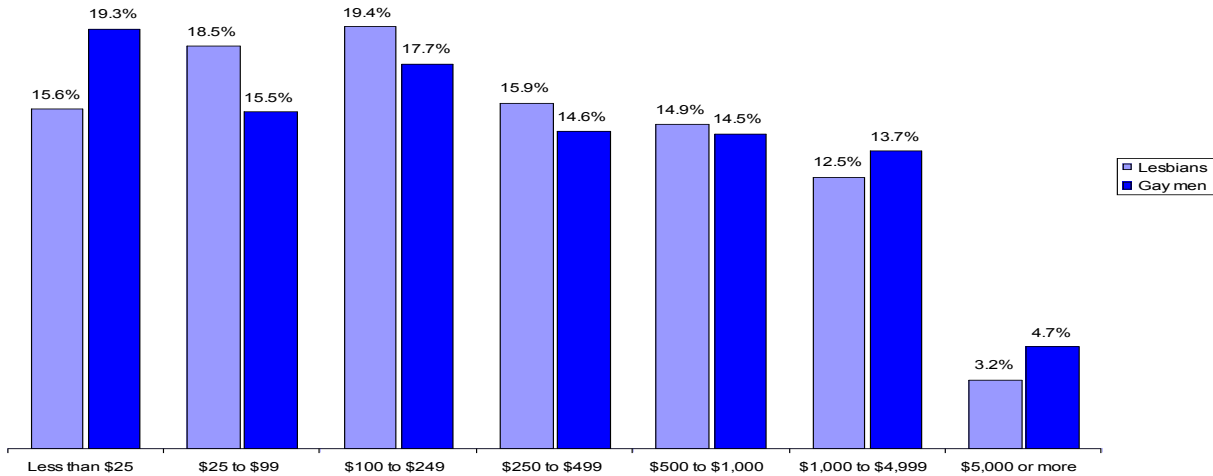
*In the last 3 years, have you ever chosen or switched to a financial services company because of its gay-friendly reputation?*



Consistent with relatively few participants considering financial service organizations supportive of the LGBT community, only 11% of respondents—12% of lesbians and 10% of gay men—said they had ever chosen or switched to a financial services company because of its gay-friendly reputation.

**Money Contributed To All Charitable Organizations:  
Gay Men and Lesbians**

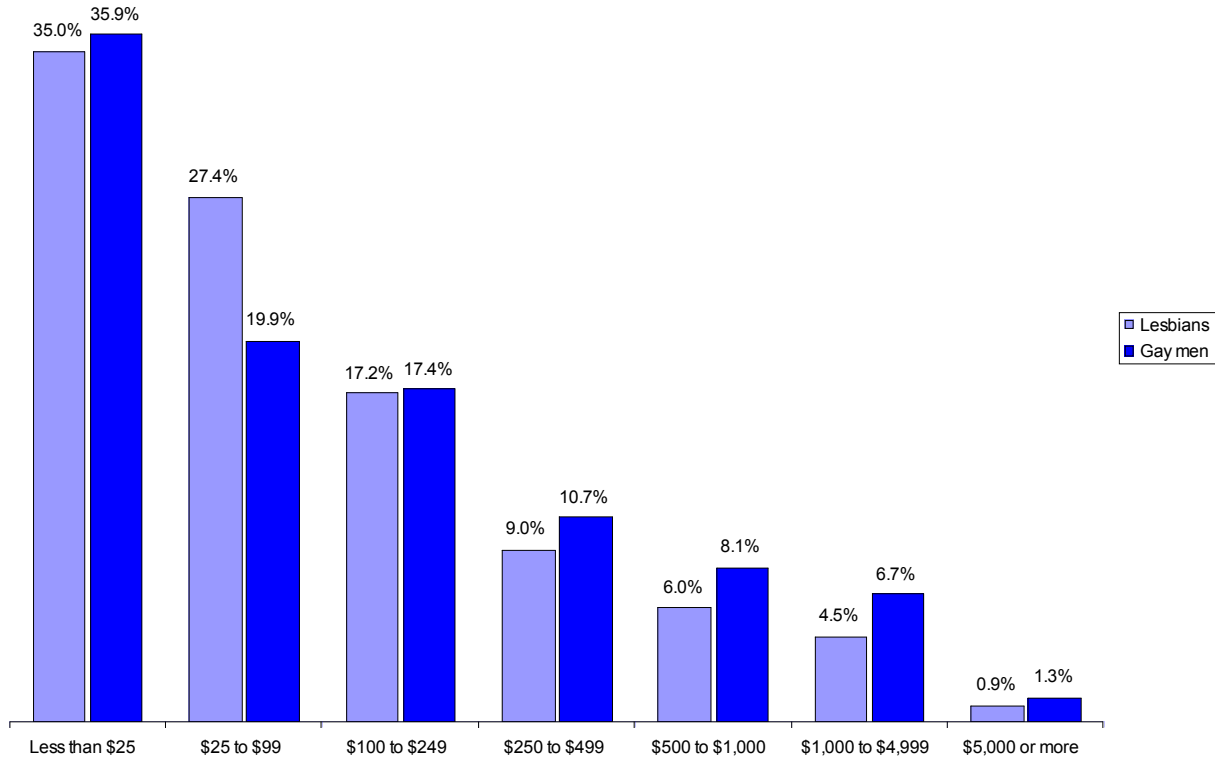
*In the last twelve months, about how much money did you contribute to all charitable organizations?*



Participants varied considerably in their tendency to give to charity. Although the largest percentage of participants (18%) said they had contributed less than \$25 to charitable organizations in the past year, about 13% reported giving between \$1000 and \$4999. 31% of lesbians and 33% of gay men reported giving over \$500 in the past year. Gay men and lesbians generally reported similar levels of contribution.

**Money Contributed To LGBT Charitable Organizations:  
Gay Men and Lesbians**

*Of this, how much money did you contribute to LGBT-specific charitable organizations?*

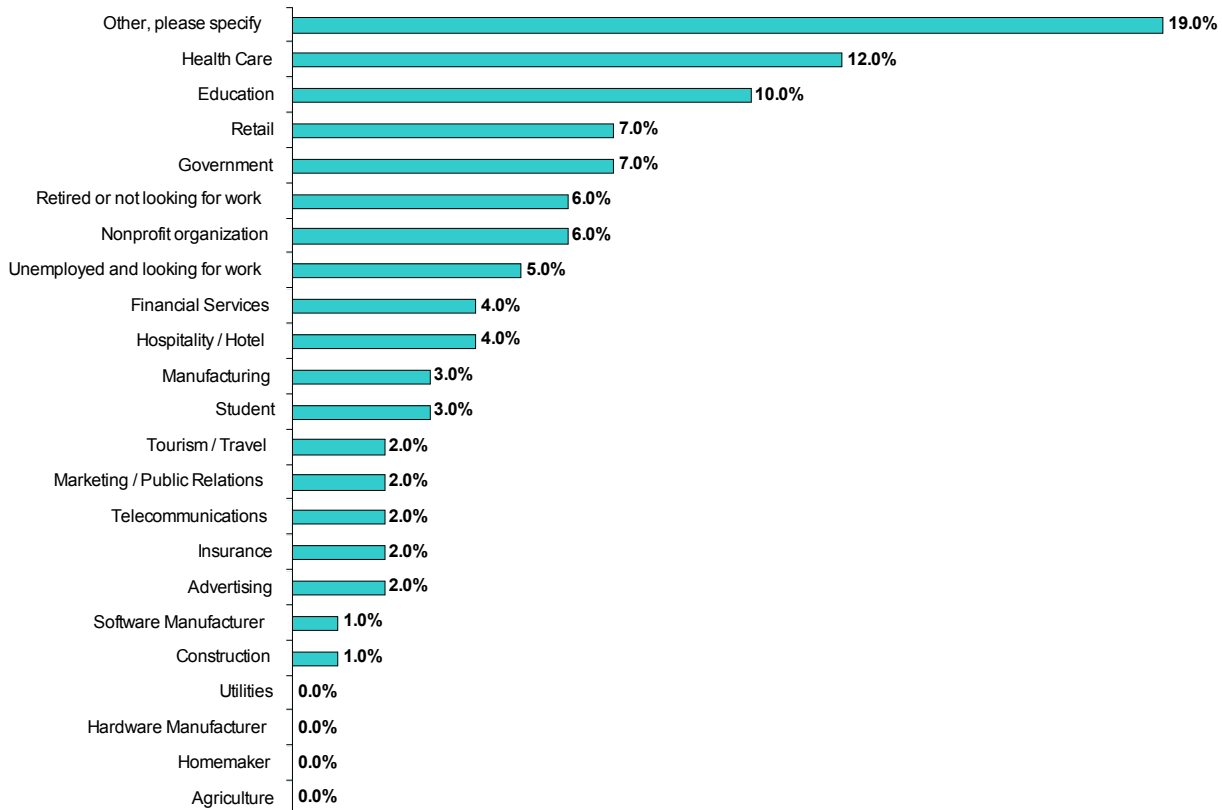


With respect to contributions to LGBT-specific charitable organizations in the past year, the largest percentage of participants (35%) said they had contributed less than \$25. Approximately 16% of gay men and 11% of lesbians reported giving over \$500 to LGBT-specific charitable organizations. Comparing with their overall giving patterns in the previous question, large donors over \$500 are more likely to give their money to non-LGBT causes (although some of these causes could be HIV related which was not specifically asked in this question).

## Work and Business Activity

### *Employer's Primary Business*

*Which of the following best describes your or your employer's primary business?* (Respondents could only choose a **single** response)

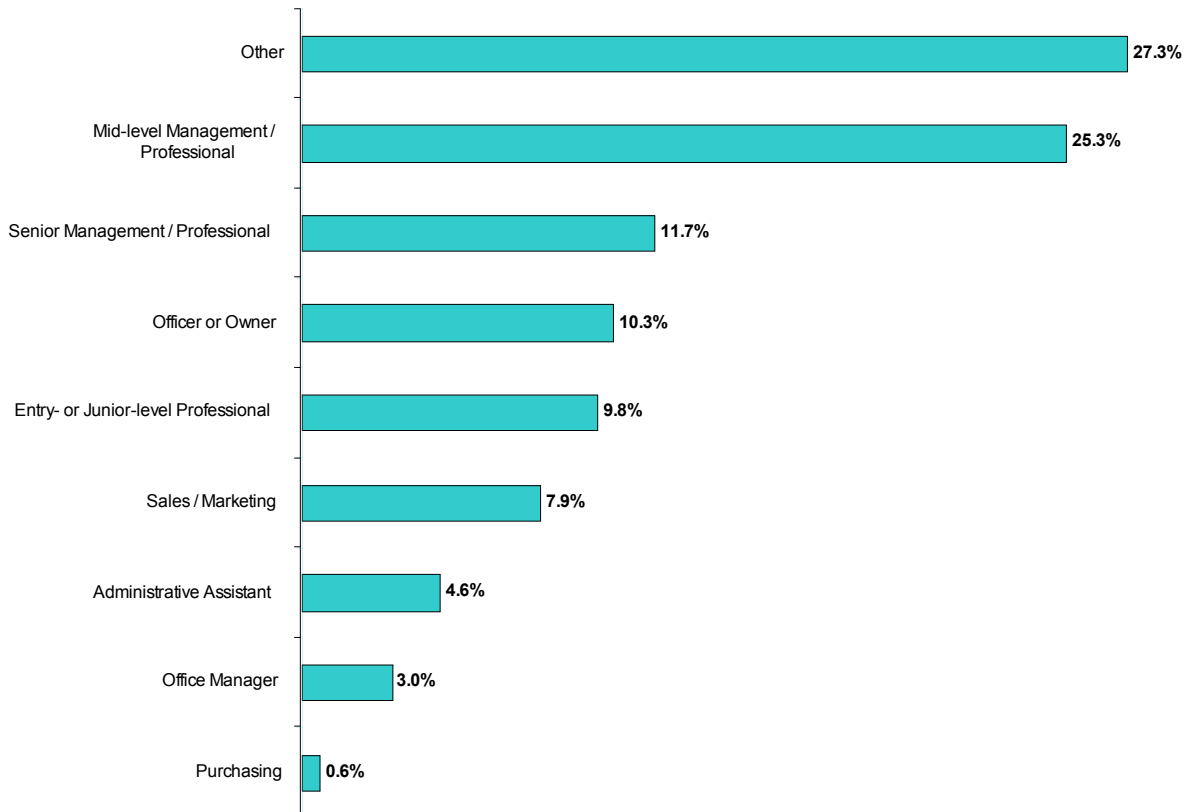


In general, participants were especially likely to say they worked in businesses other than those listed in the survey (19%), such as real estate, transportation, entertainment, publishing, computers, or law. Another 12% said they worked in health care, 10% in education, 7% each in retail or government, and 6% each in non-profits, or were retired or not looking for work.

Lesbians were more likely than gay men to say they worked in health care (15% compared to 10%) or education (13% compared to 9%).

### ***Position Within the Organization***

*What is your position within your organization?* (Respondents could only choose a **single** response)

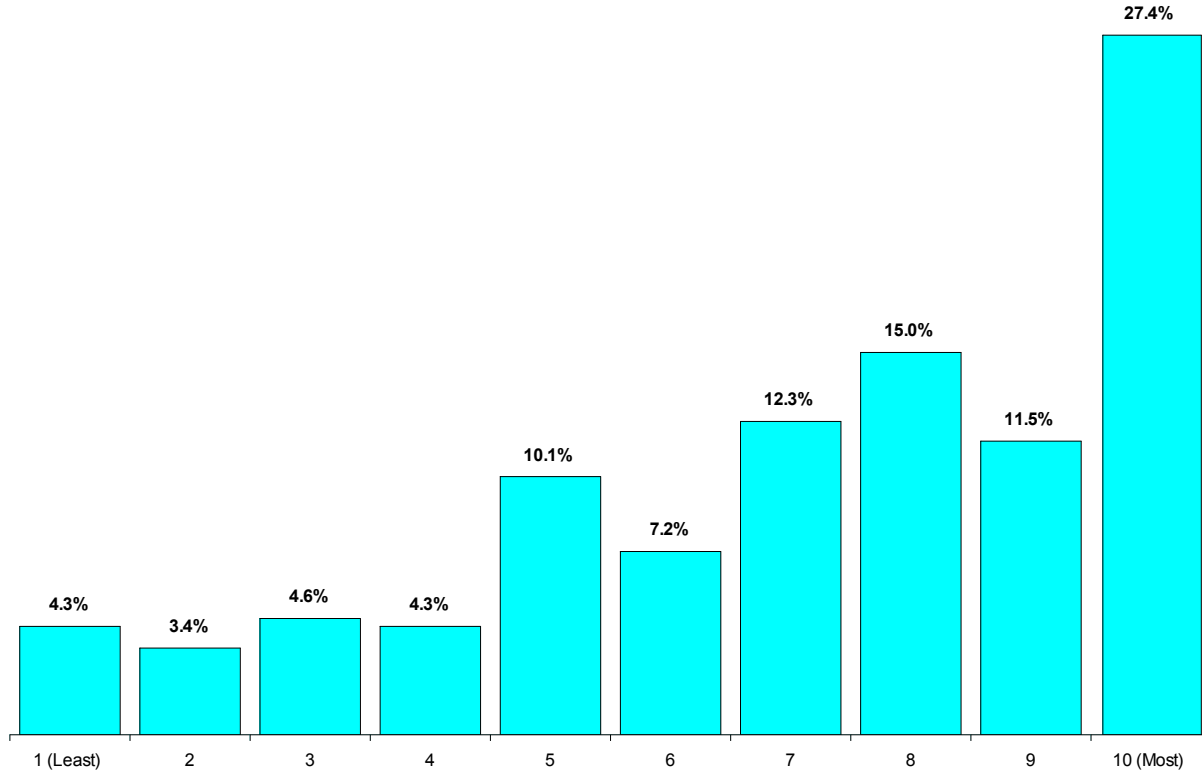


Of participants responding to a question about their positions within their organizations, one-quarter (25%) reported being mid-level managers/professionals, 12% reported being senior managers or professionals, and 10% each said they were officers/owners, or entry- or junior-level professionals. Others said they were in sales (8%), or were administrative assistants (5%), office managers (3%) or in purchasing (1%). Another 27% indicated roles other than those listed, including teacher or professor, social worker or therapist, or support staff, technical staff, or worker.

There was no significant difference between gay men and lesbians when comparing for management mid-level management, (26% compared to 24%). Gay men may slightly be more likely to be in senior level management positions (13% compared to 9%), but close to the margin of error. However, a greater percentage of lesbians than gay men reported having positions other than those listed (32% compared to 25%).

### How LGBT-Friendly Employer Is

*In your opinion, how LGBT-friendly is your employer? Please rank on a scale of 1 to 10, where "1" is absolutely not LGBT-friendly and "10" is LGBT-friendliness could not be better. If you are not currently employed, please skip this question.*

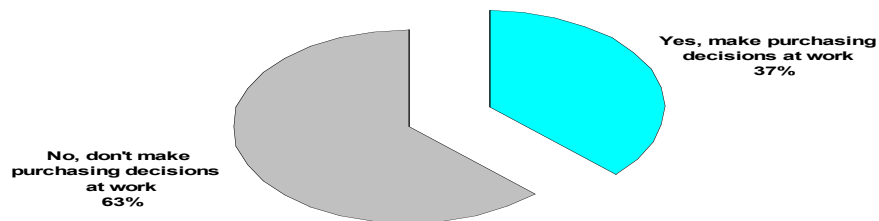


(N = 13,331)

The greatest percentage of participants (27%) gave their employers a rating of 10 out of 10 for being very LGBT-friendly. The average rating was 7.2 out of 10. On average, gay men gave their employers higher ratings for LGBT-friendliness (Mean = 7.3) than lesbians did (Mean = 7.0), both very favorable.

### ***Make Purchasing Decisions on Behalf of Employers***

*In your position at your place of work, do you make purchasing decisions on behalf of the employer?*

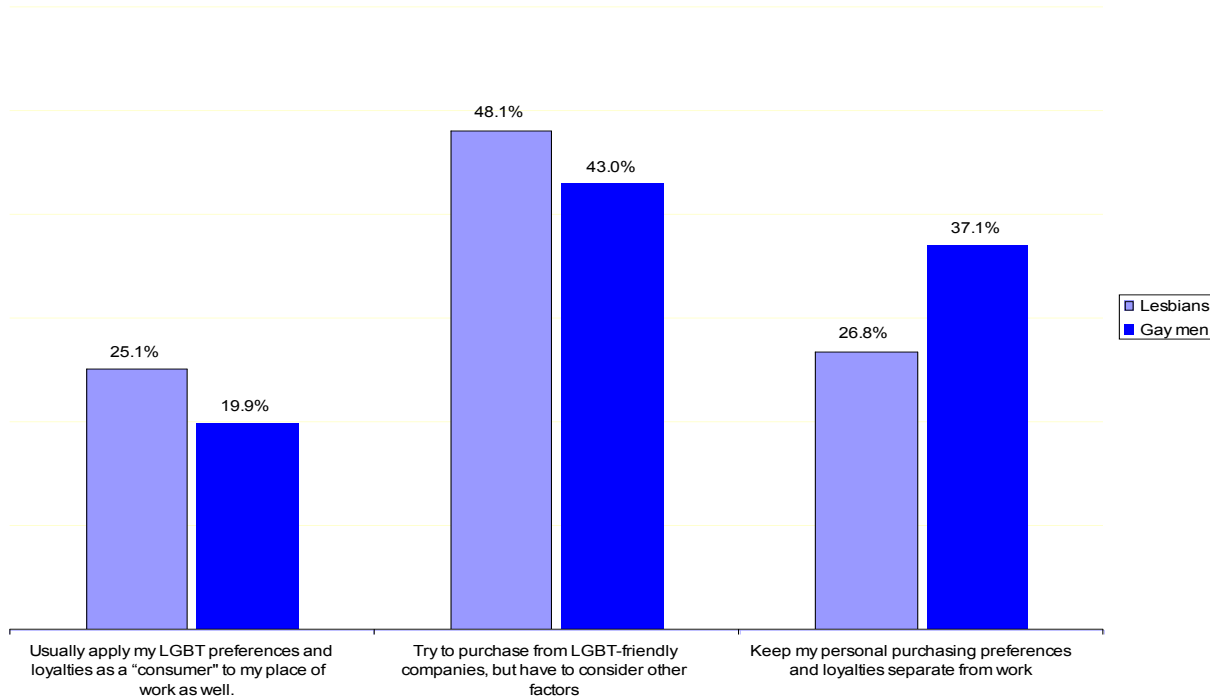


Asked if they make purchasing decisions for their employers, over one-third (37%) of participants said they do. Gay men were more likely to say they made such decisions (39%) than lesbians were (34%).



### ***Purchasing Decisions Influenced by Connection to LGBT Community: Gay Men and Lesbians***

*Are your business purchasing decisions influenced by your personal connection to the LGBT community? In other words, when purchasing at work, do you select airlines, hotels, and other suppliers that are known to be “LGBT-Friendly?”*



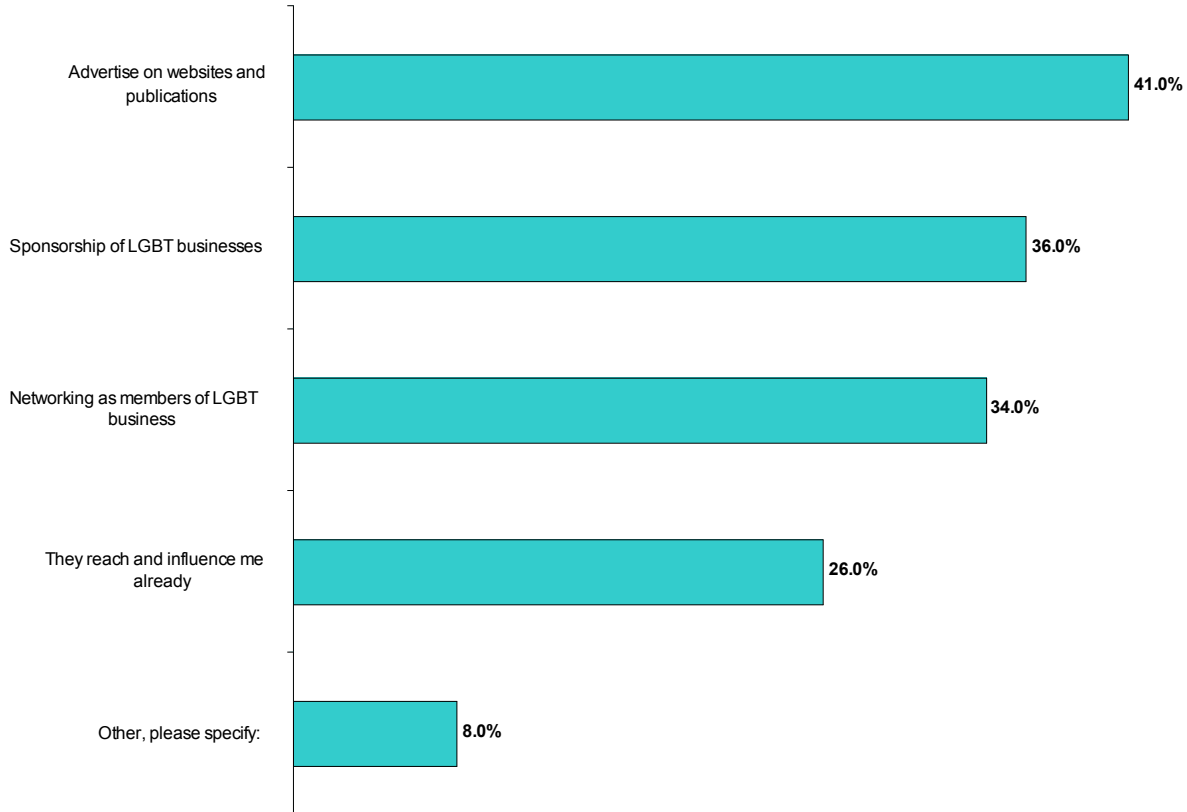
(N = 5381)

In general, those who said they made purchasing decisions at work (and noted influences on their decisions) were especially likely to say they tried to purchase from LGBT-friendly companies but had to consider other factors (44%). Another one-third (35%) said they tried to keep their personal purchasing preferences separate from their work, with gay men stating this preference (36%) more than lesbians did (27%). Lesbians were more likely than gay men to say they would apply their personal purchasing preferences in the workplace (25% compared to 20%) or try to purchase from LGBT-friendly companies even as they considered other factors (48% compared to 43%).

***Best Way to be Reached for Purchasing Decisions***

*How should an LGBT-friendly corporation reach you as a purchasing decision-maker at work? Mark all that apply.*

(Respondents were allowed to choose **multiple** responses)

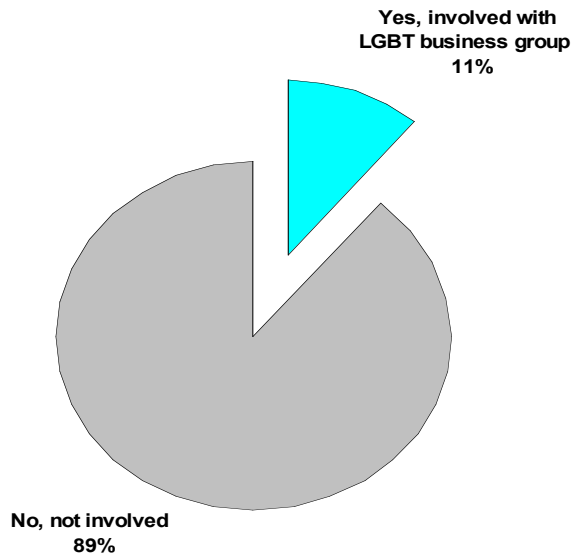


(N = 6408)

Those participants who reported making purchasing decisions thought the best way for LGBT-friendly corporations to reach them would be by advertising on websites and publications of local and/or national LGBT business organizations (41%). About one-third thought company sponsorship of LGBT business organizations (36%) or networking as members of LGBT business organizations (34%) would be good ways to reach them. About one-quarter (26%) said they were already reached through LGBT consumer media and sponsorships, with gay men being more likely to report this (27%) than lesbians were (21%).

***Involved with Local LGBT Chamber of Commerce  
or Business Organization***

*Are you a member of, or involved with, your local LGBT chamber of commerce or business organization?*



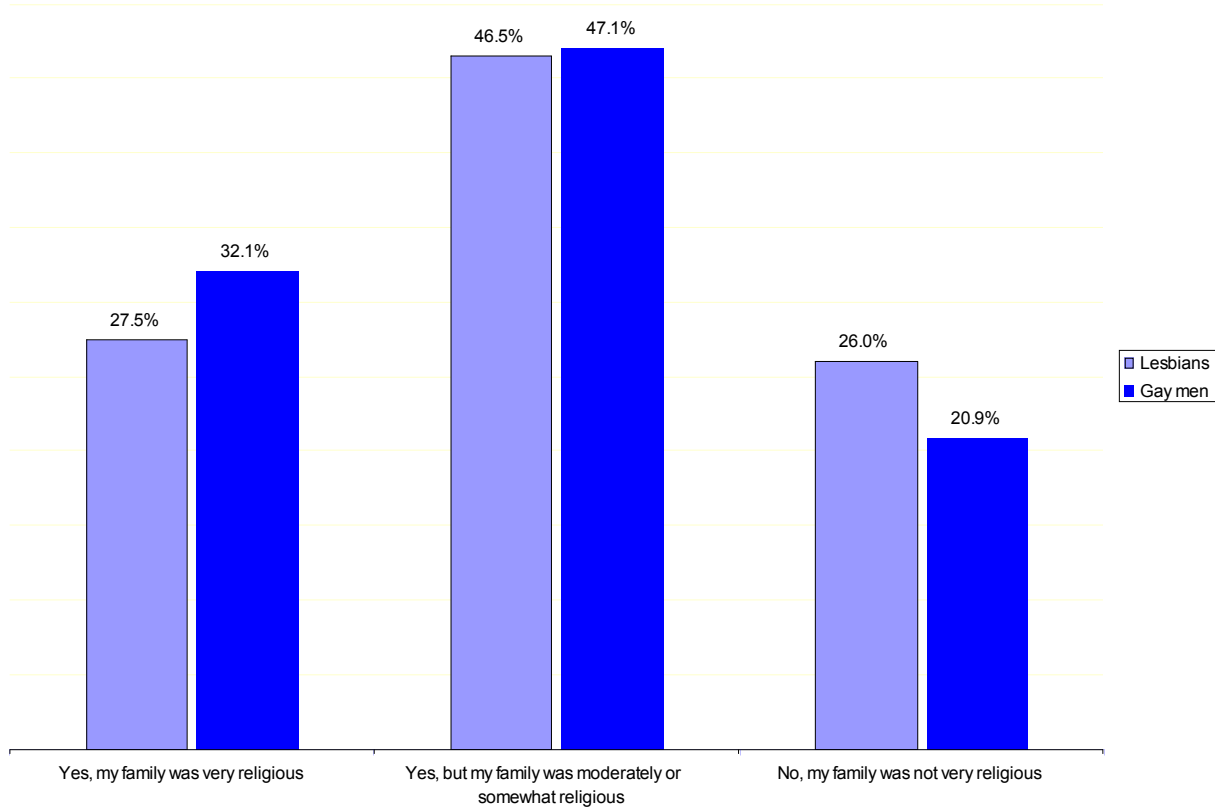
*(N = 6044)*

Most of these participants (89%) said they were not involved with local LGBT chamber of commerce or business organizations. Gay men and lesbians did not differ in their responses.

Religion

**Religious Upbringing:  
Gay Men and Lesbians**

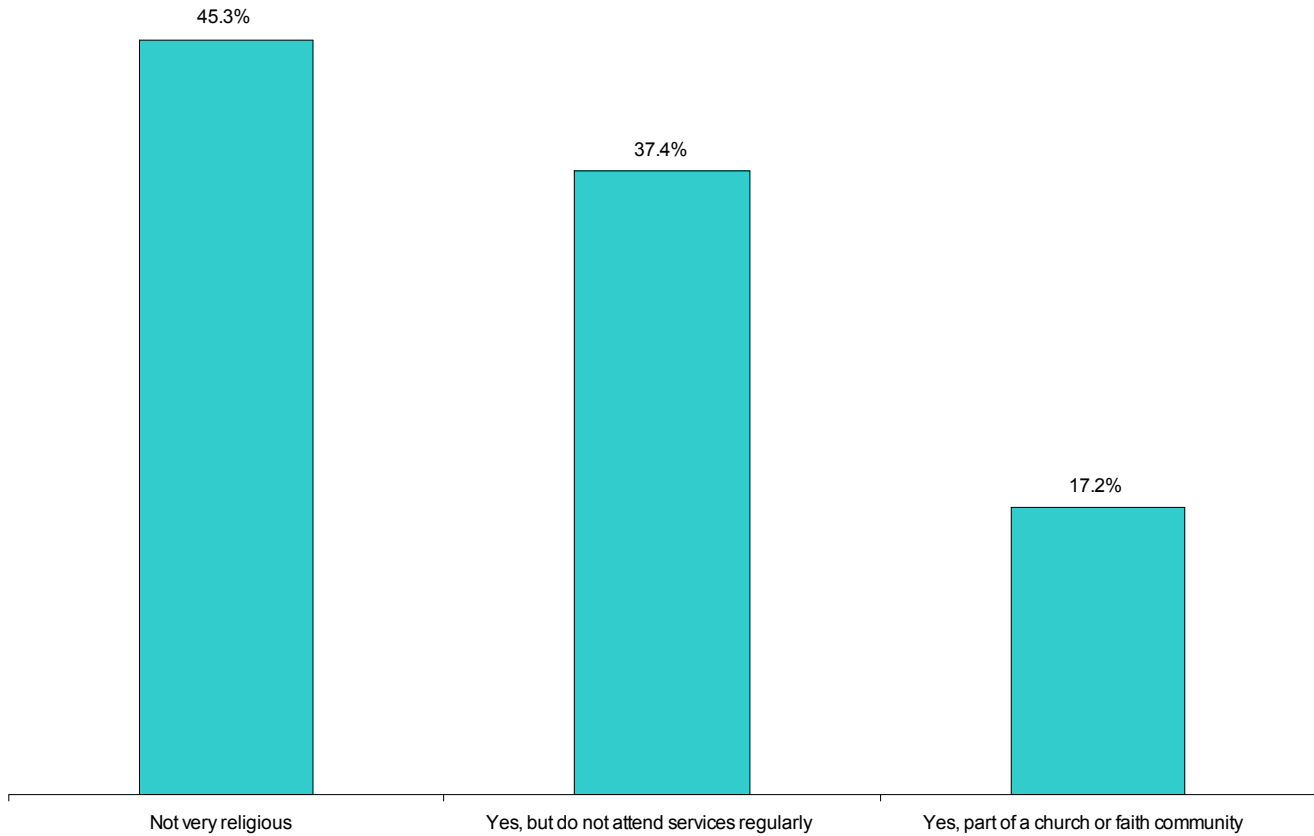
Were you raised in a faith or religious community?



The next set of questions asked participants about their religious upbringing and preferences. Almost half of participants (47%) said that their family of origin was moderately or somewhat religious, whereas 31% said their families were very religious and 22% said their families were not very religious.

### Consider Yourself Religious

Do you now consider yourself to be religious or a person of faith? (Respondents could only choose a **single** response)

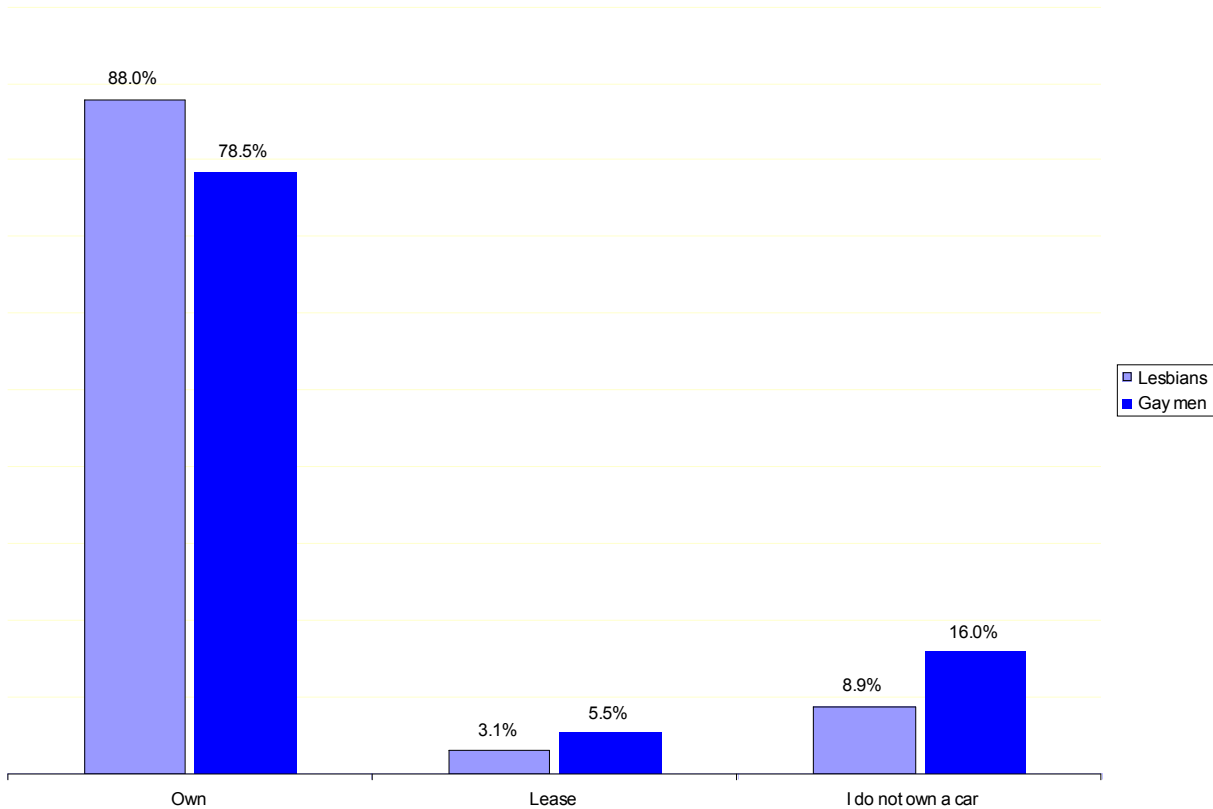


Almost half (45%) said they currently were not very religious. A somewhat smaller group (37%) said they were religious but do not attend services regularly. Only 17% considered themselves part of a church or faith community. Lesbians and gay men did not differ in their responses to this item.

**Travel**

***Own a Car:  
Gay Men and Lesbians***

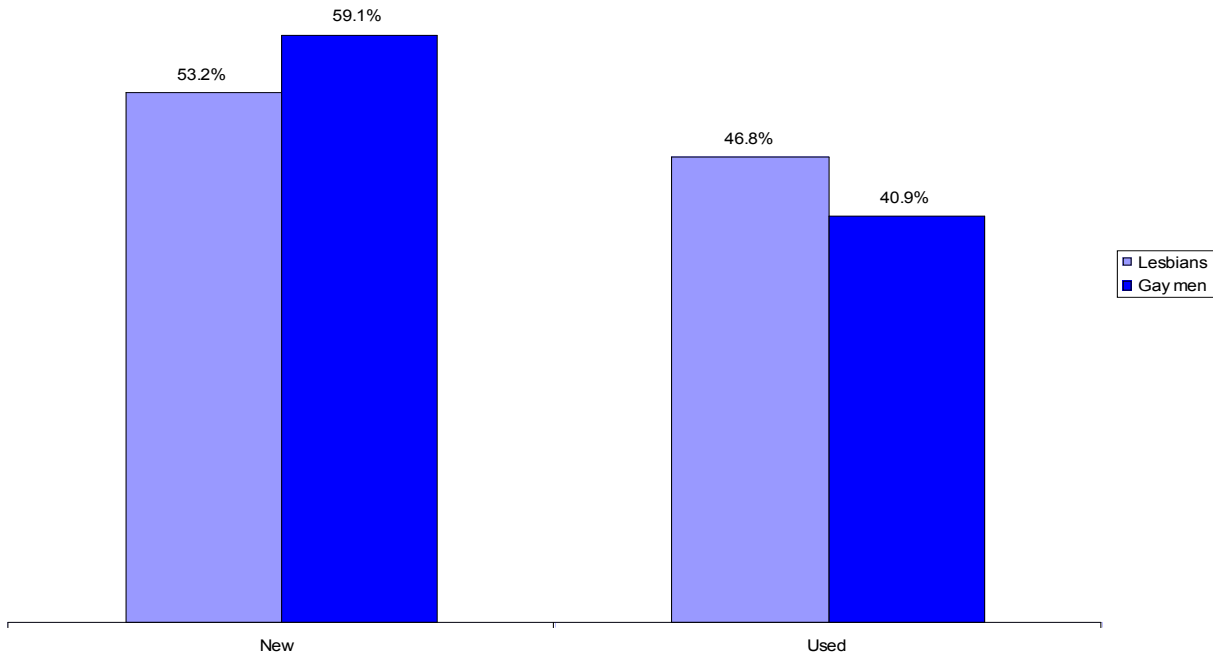
*Do you own or lease your car?*



The next set of questions asked about participant travel. Overall, most respondents (81%) said they owned a car. Consistent with being more likely to live outside cities, lesbians were more likely to say they owned a car than gay men were (88% compared to 79%).

### Bought Car New or Used: Gay Men and Lesbians

*Did you acquire your most recent vehicle new or used?*



(N = 12,231)

Of those who said they owned a car, the majority (57%) said they had bought it new. Gay men were more likely to report buying a car new (59%) than lesbians were (53%).

### ***Currently Monthly Car Payment***

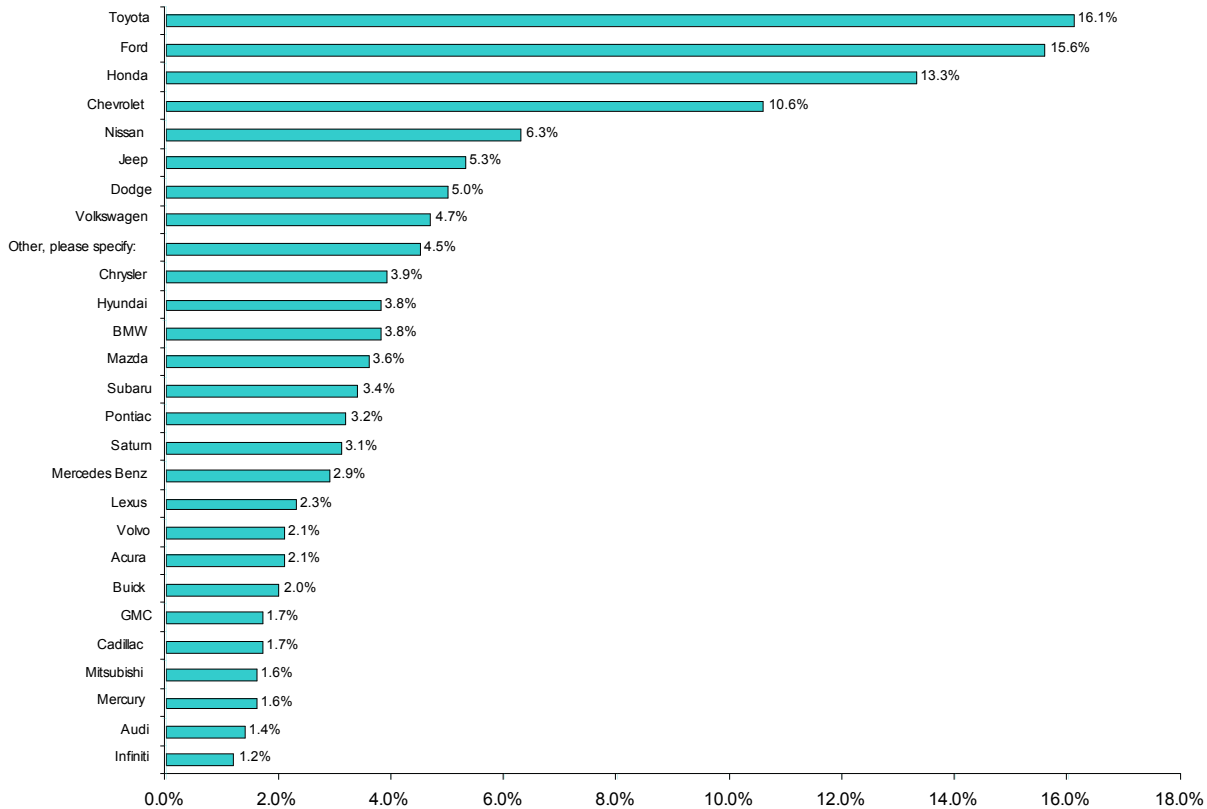
*What is your current monthly car payment? Please enter the amount in US Dollars. If you do not own a car or own your car outright, please skip this question.*

In general, respondents making car payments (N = 7,155) said the average car payment was \$317 per month. Consistent with reporting that they were more likely than lesbians to buy a new car, gay men also reported higher average car payments (Mean = \$338) than lesbians did (Mean = \$262).



### Type of Car in Household

What brand(s) of car are in your household's possession? Check all that apply.  
 (Respondents were allowed to choose **multiple** responses)

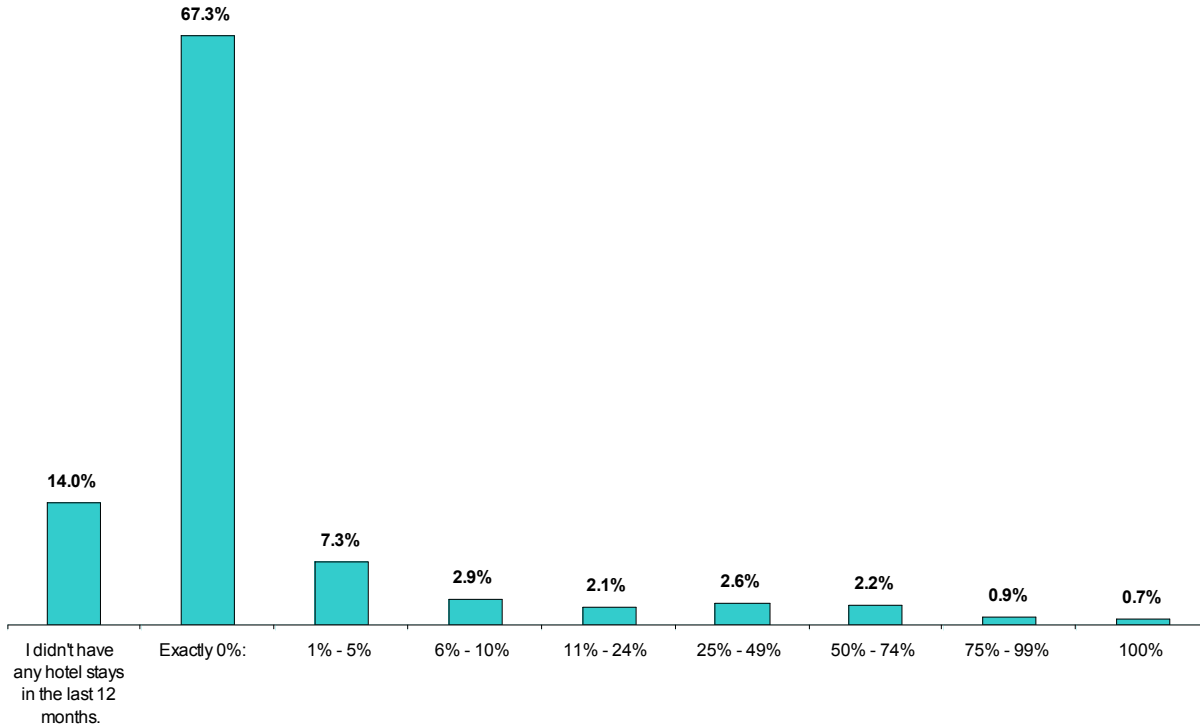


Participants were especially likely to say they owned or leased a Toyota (16%), Ford (16%), Honda (13%) or a Chevrolet (11%). Less than 1% said they owned a Plymouth, Porsche, GM, Isuzu, Suzuki, Saab, Lincoln, Oldsmobile, or Scion.

Gay men and lesbians who owned or leased cars reported largely similar preferences in American brands. However, lesbians were more likely than gay men to prefer Japanese brands, including Toyota (23% compared to 16%), Honda (18% compared to 13%), Nissan (8% compared to 7%) and Subaru (8% compared to 2%). Gay men were more likely than lesbians to prefer two expensive European brands: BMW (5% compared to 2%) and Mercedes (4% compared to 2%).

### Spent Over \$300 Per Night For a Hotel Room

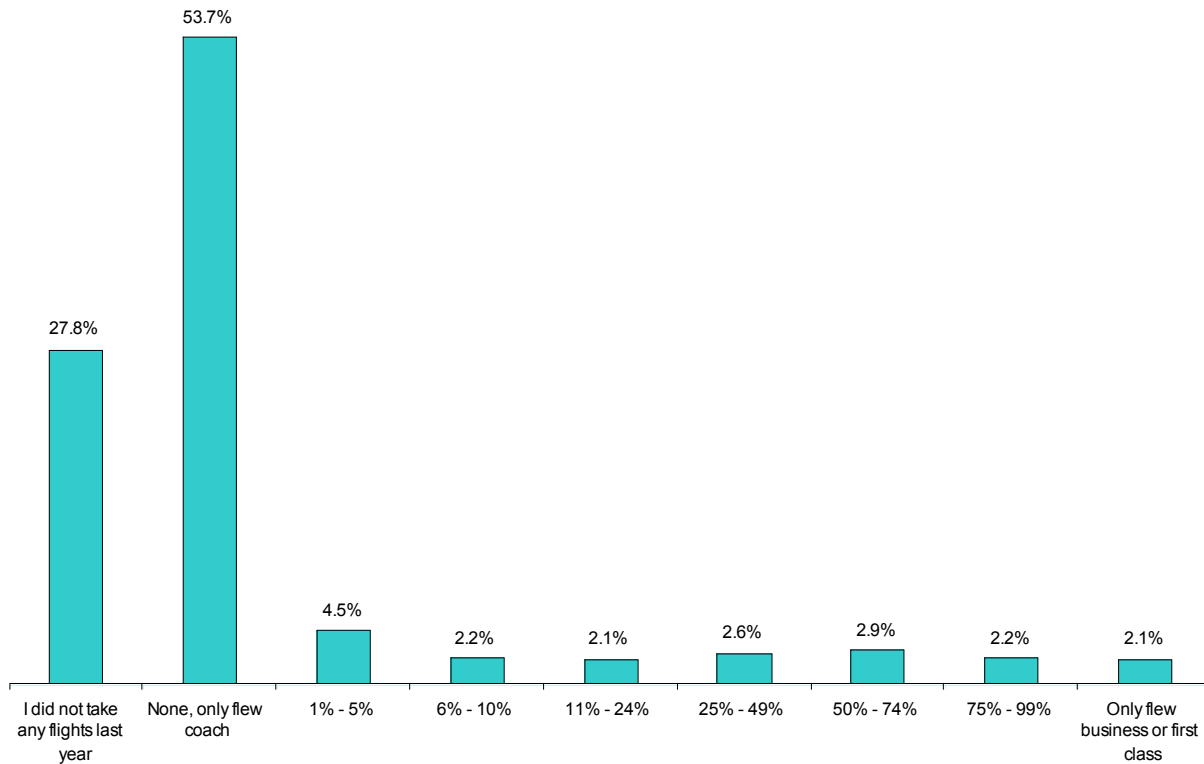
What portion of these nights did you spend over \$300 per night for the room? (Respondents could only choose a **single** response)



Other than the 14% of participants who said they did not stay in a hotel in the past year, two-thirds of respondents (67%) said they had not paid over \$300 a night for a hotel room. Of the 19% who did report paying over \$300 for a room, the largest percentage (7%) said they had spent that much for a hotel room only between 1% and 5% of the time—that is, possibly just once in the past year. Lesbians were less likely to say they had spent \$300 or more on a hotel room in the past year (16%) than gay men were (24%), with gay men reporting higher percentages of spending than lesbians in every category of spending.

### Portion of Flights in Business Class

What portion of these flights were in business class or better?



(N = 13,424)

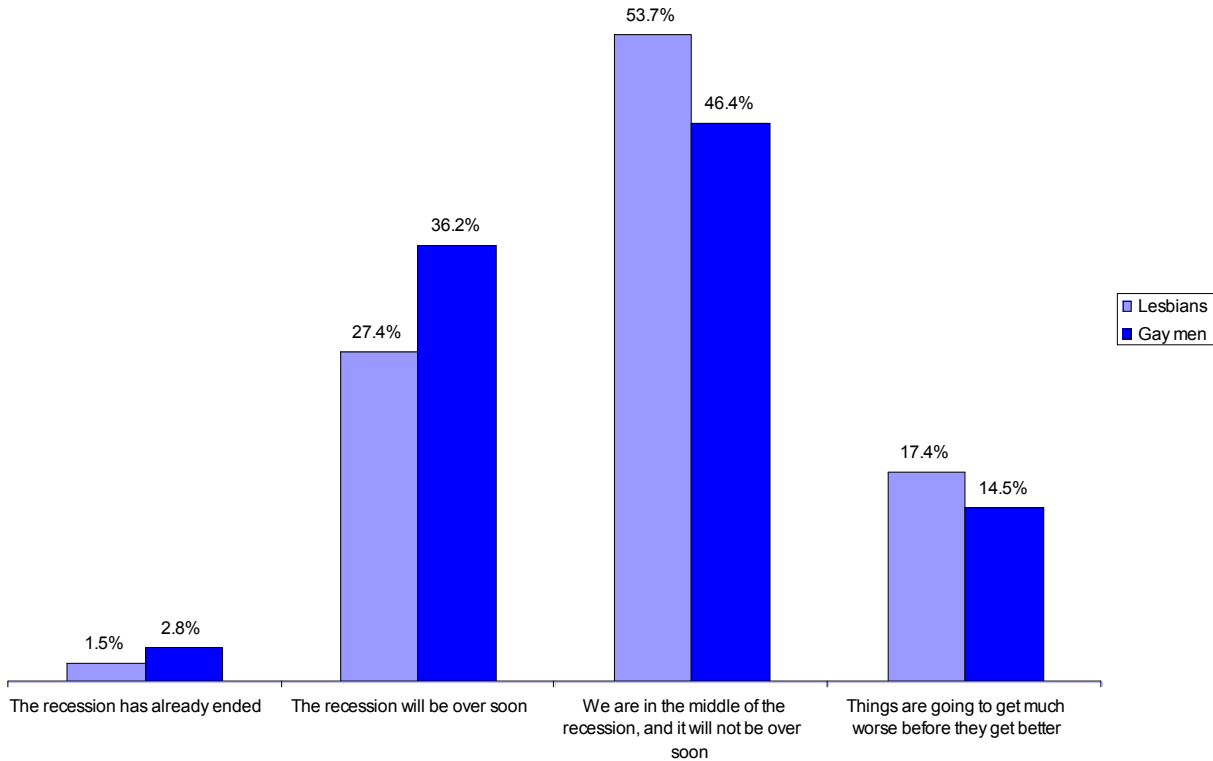
Besides the 28% of participants who said they did not fly in the past year, about half (54%) of participants said they flew coach when they flew. Only 18% of respondents said they flew business- or first-class, of which the largest group (5%) said they flew business- or first-class only 1% to 5% of the time.

Of those who did report taking round trip flights in the past year, lesbians were less likely to say they flew business- or first-class (15%) than gay men were (30%), with gay men reporting higher percentages of spending for business- or first-class flights.

**Perceptions of Economic Recession**

***View of Recession:  
Gay Men and Lesbians***

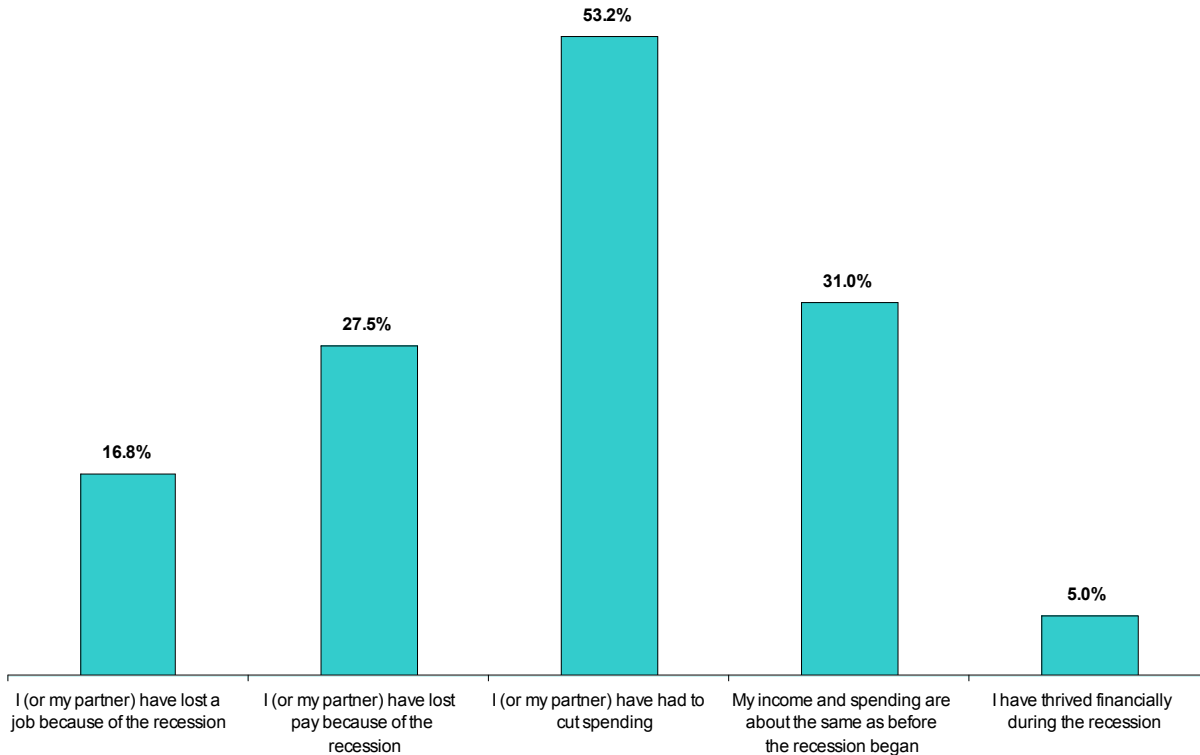
*How do you feel about the current recession?*



Participants were also asked about their views of the economic recession. Almost half (48%) thought the U.S. was in the middle of a recession and that it would not be over soon. The next largest group (34%) thought the recession would be over soon, while smaller percentages thought things would get worse (15%) or that the recession had already ended (2%).

### Effect of Recession on Income

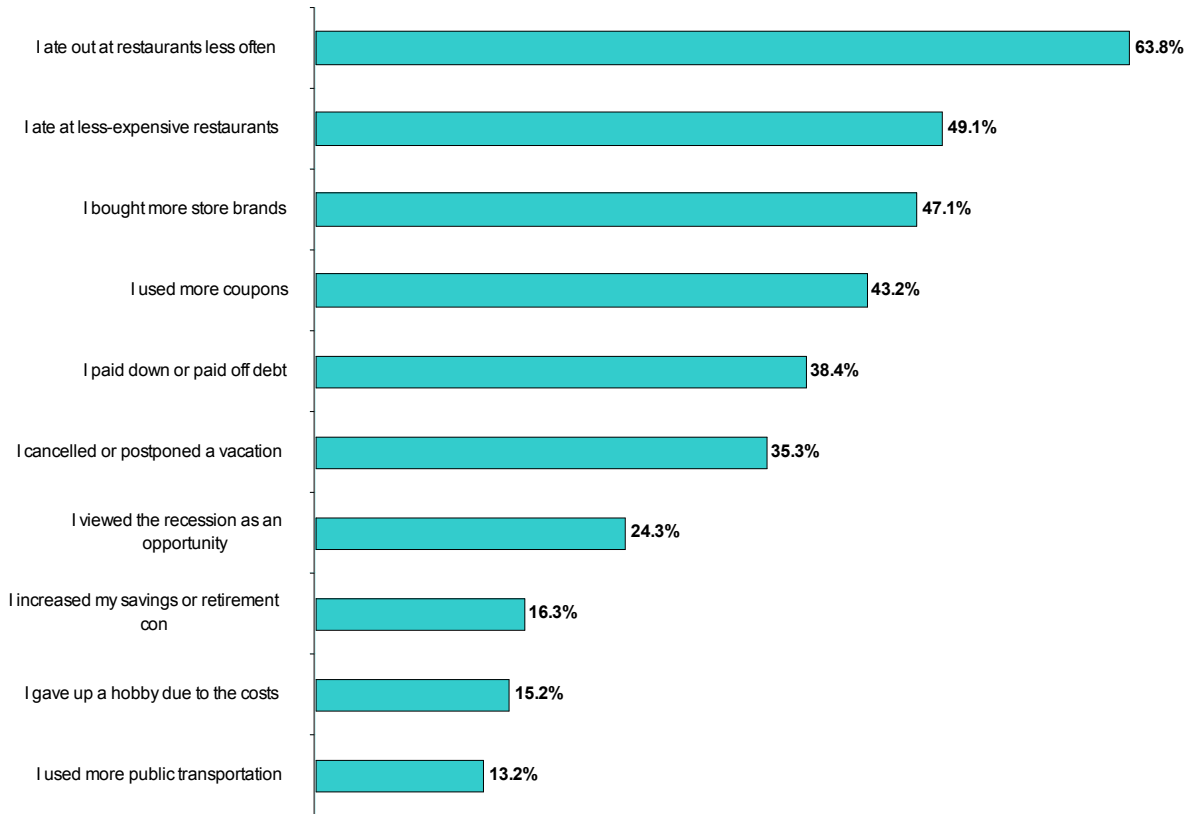
Has the recession affected you and your family? Check all that apply.



According to participants, the main effect of the recession had been to force them to cut spending (53%), although about one-third (31%) said they had not felt any effect on income or spending. Smaller percentages of respondents reported having lost pay (28%) and/or a job (17%). Only 5% of respondents reported thriving during the recession.

### Effect of Recession on Types of Expenses

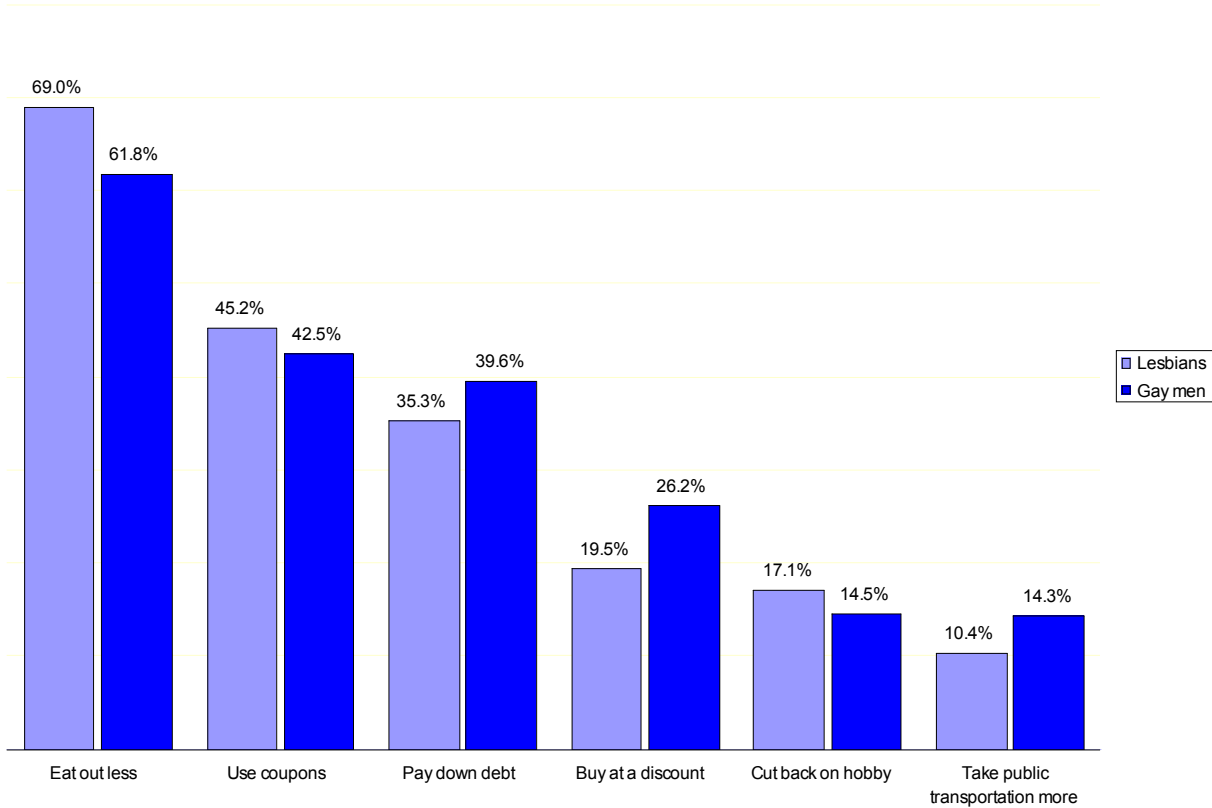
*In order to get an overview about how the recession has influenced your consuming patterns, please mark all that apply. During the past year...* (Respondents were allowed to choose **multiple** responses)



In response to the recession, respondents said, they were especially to have changed their spending on food and incidentals—whether eating out at restaurants less often (64%), eating at less expensive restaurants (49%), buying more store brands (47%), or using more coupons (43%). Smaller percentages of respondents reported tackling larger expenses—paying down a debt (38%), canceling or postponing a vacation (35%), or trying to buy at a discount generally (24%). Another 16% said they had tried to increase their savings or retirement contributions. Participants also reported giving up hobbies (15%) or taking public transportation (13%) to reduce costs.

**Effect of Recession on Types of Expenses:  
Gay Men and Lesbians**

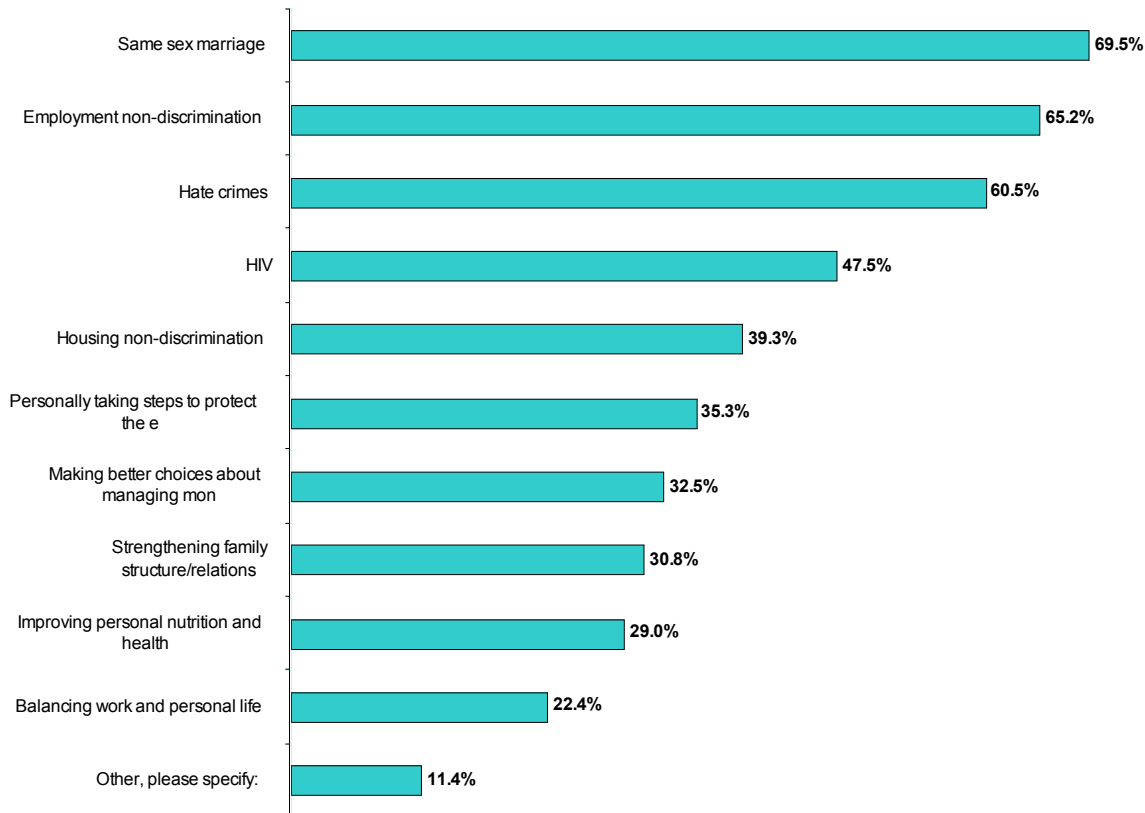
*In order to get an overview about how the recession has influenced your consuming patterns, please mark all that apply. During the past year...*



Compared to gay men, lesbians were more likely to report that as a result of the recession they were eating out less (69% compared to 62%). Gay men were more likely to report paying down debt (40% compared to 35%) or buying at a discount (28% compared to 20%) as a result of the recession.

### Most Important Issues for LGBT Americans

*What do you consider is the most important issue(s) for LGBT Americans and our elected officials to act on today? Please mark all that apply.* (Respondents were allowed to choose **multiple** responses)

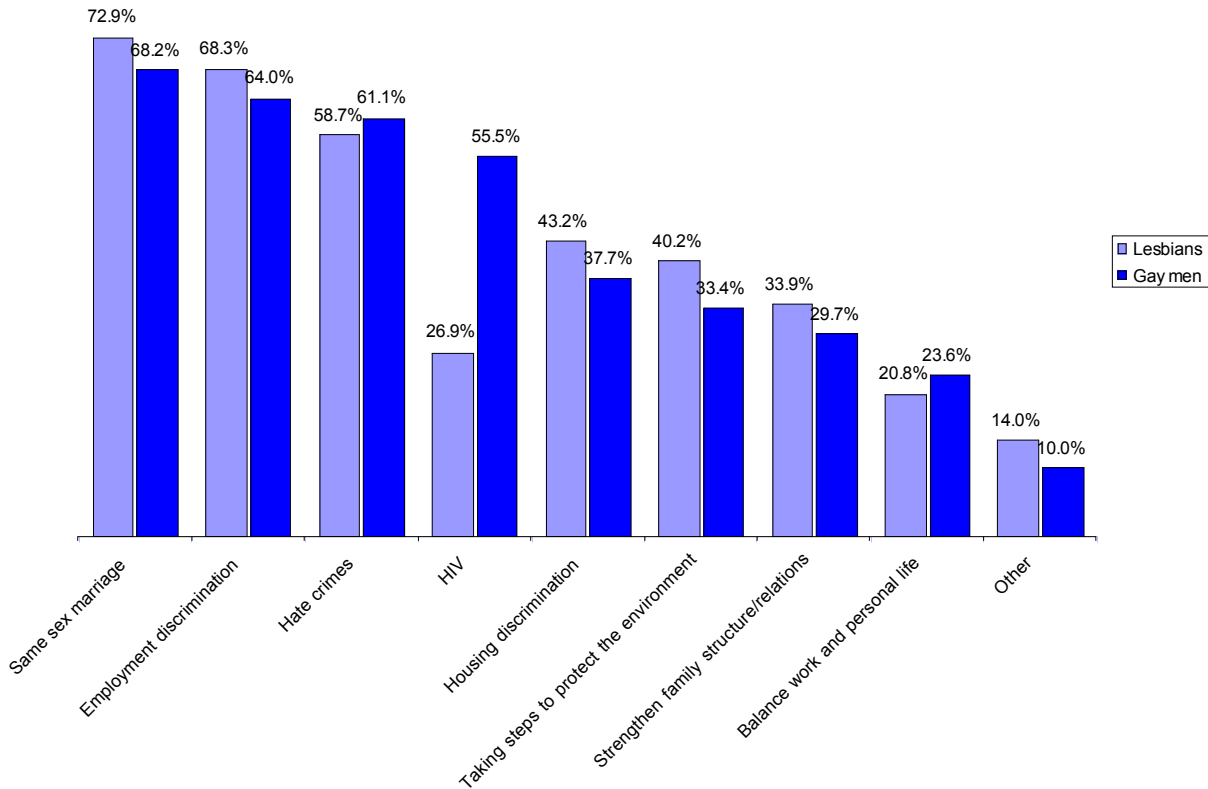


Finally, participants were asked what they considered the most important issue(s) for LGBT Americans and elected officials to act on today. Consistently LGBT-specific concerns were more important to LGBT Americans than more broad personal issues such as health care or money issues.



**Most Important Issues:  
Gay Men and Lesbians**

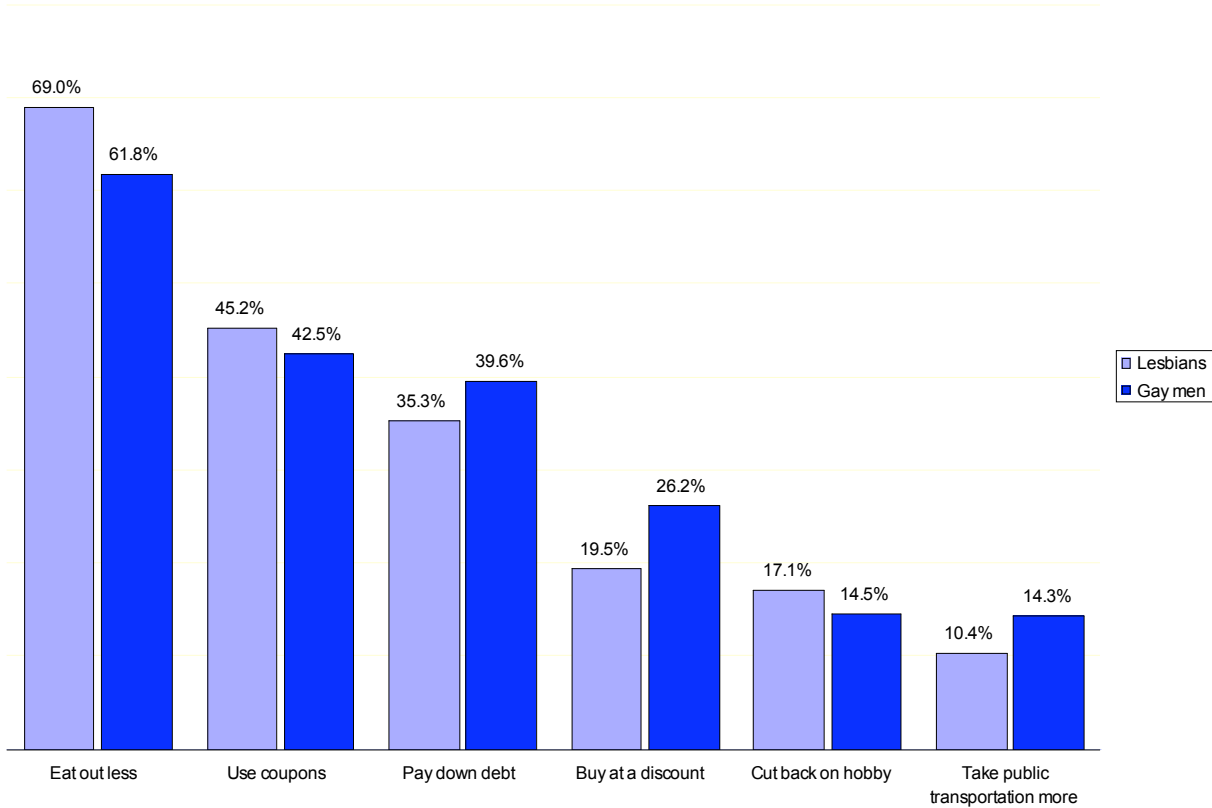
*What do you consider is the most important issue(s) for LGBT Americans and our elected officials to act on today? Please mark all that apply.*



Gay men and lesbians were similar in their concerns, except for HIV which was more of a concern for gay men.

***Effect of Recession on Types of Expenses:  
Gay Men and Lesbians***

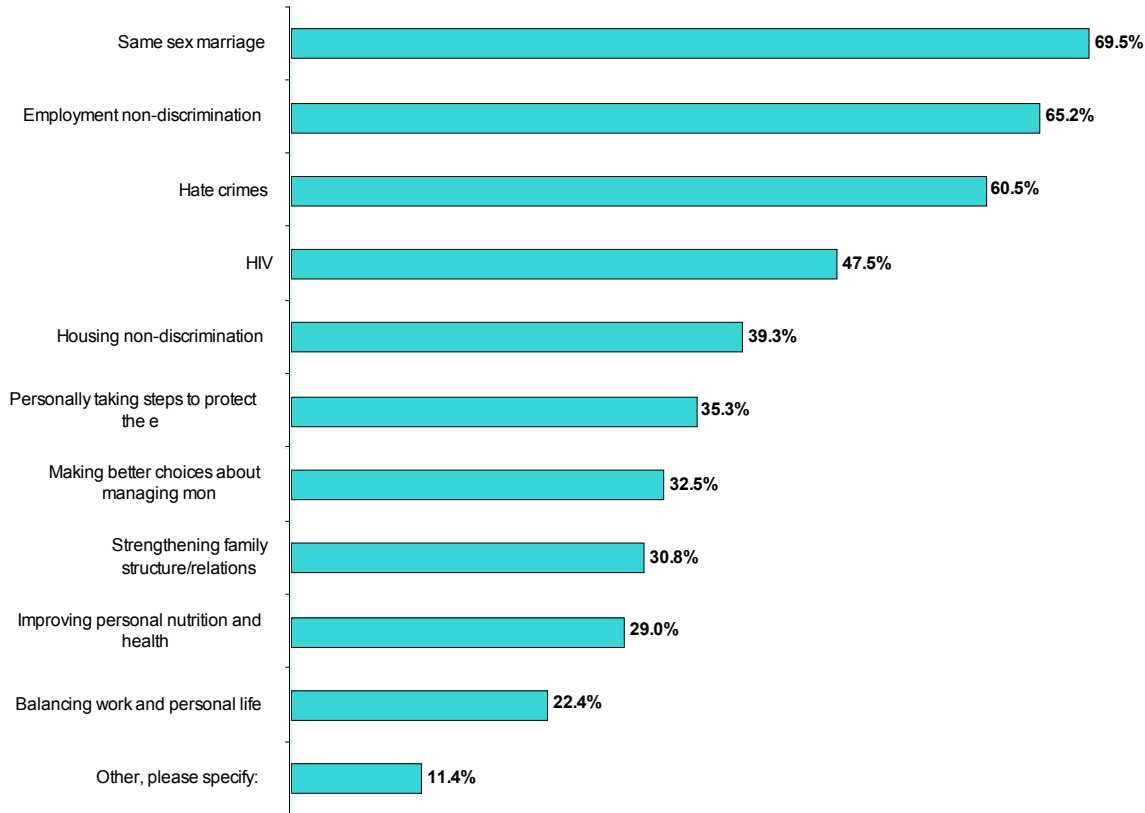
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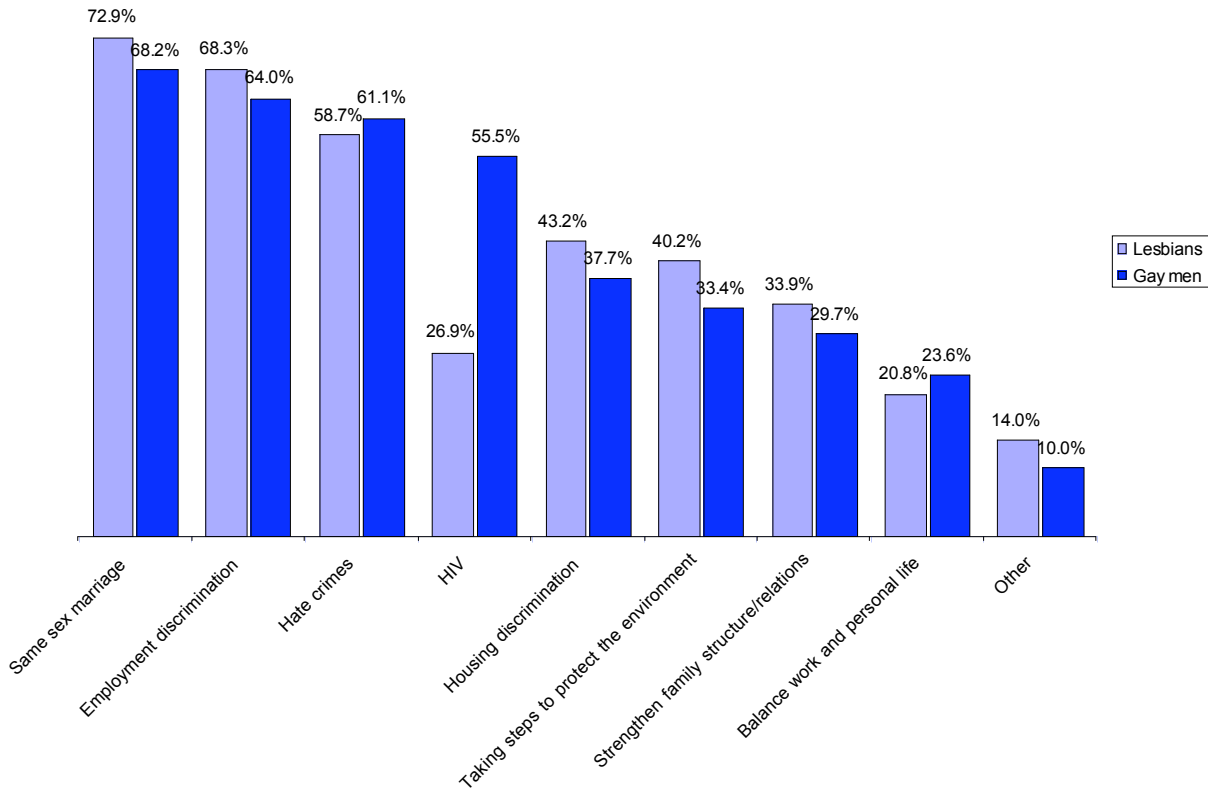
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Gay men and lesbians were similar in their concerns, except for HIV which was more of a concern for gay men.

## **ABOUT COMMUNITY MARKETING, INC.**

The facts are plain: As a niche market segment, gay men and lesbians have a significant amount of disposable income. Most critically, their dollars go to product and service suppliers that recognize their unique buying preferences and offer them differentiated value.

Community Marketing, Inc. has been helping a wide variety of industry leaders master the subtleties of this market since 1992. Our unique and specialized services are based on over 17 years of experience and case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), with our proprietary panel of 50,000 LGBT consumers; strategic consulting; marketing planning; media buying; and marketing plan management. We produce custom, on-site training sessions, develop conferences, symposia and webinars, and speak at industry events.

Whether your organization is just learning about the market or is updating its strategy, Community Marketing can accelerate your plans, reduce your risks and deliver measurable results. Because the LGBT community comprises a “slice” of the world’s population, you’ll find markets for singles, couples and families in every ethnicity. And you’ll find a world of diverse interests. Community Marketing’s proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing, Inc. has earned its position as the global leader in LGBT market research and development. Through the company’s tireless efforts since 1992, “doors have opened” around the world for gay and lesbian consumers. We have helped grow LGBT market recognition through research, media relations and education; and have brought opportunities to many of the world’s leading marketers.

CMI’s LGBT Market Research + Development Lab™ clients include:

- ABSOLUT (Pernod Ricard)
- Bridgestone Corporation
- Cirque du Soleil
- Domus Properties, LLC
- E. & J. Gallo Winery
- Ernst & Young
- Greater Philadelphia Tourism Marketing Corporation
- Harrah’s Entertainment
- Hyatt Hotels
- Japan National Tourism Organization
- MillerCoors Brewing Company
- New York Life
- NYC & Co.
- Starwood Hotels & Resorts
- Switzerland Tourism
- Travelocity
- Union Bank
- Wells Fargo Bank

*And many others*

# LGBT Market Research:

*There is a difference.*

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

## WHO ARE YOU TALKING TO?

Community Marketing, Inc. (CMI) has developed our proprietary consumer panel over the past 15+ years by circulating field surveys at leading LGBT events, and by partnering with LGBT organizations and media across the USA, Canada, the UK, and around the world. These partners distribute our survey invitations via print ads, web banners, and email broadcasts to their memberships and/or readers. The resulting panels are highly representative of LGBT consumers who interact with the LGBT community and media. *This is important:* If your communications channels are via the LGBT media, you'll want to depend on research that represents these consumers' interests, preferences, sensitivities and motivations. CMI research is trusted by—and frequently quoted in—the *New York Times*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *USA Today*, the *Wall Street Journal*, *Brand Week*, *Ad Week*, CBS News, Associated Press, etc.

*Other providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate that they are gay or lesbian in the context of a survey. This academic approach, attempting to "represent the gay community at large," may be appropriate for some studies. But we feel that for marketers desiring valid consumer insights about products, services, advertising creative and marketing strategies, this methodology it is not likely to represent LGBT community members who are reading the media where you are placing ads.*

## IN RESEARCH, SIZE DOES MATTER.

CMI has conducted over a hundred LGBT-dedicated research studies since the early '90s, covering a wide variety of topics, industries and interests. We both observe and influence the trends of this market. Size does matter in the case of research. Our research panel has grown to over 50,000 qualified LGBT consumers, the largest of its kind, by far. Our recent LGBT Consumer Index® study attracted over 30,000 survey participants, making it the largest such study in history. We leverage our long history/experience/expertise for your benefit, and fine-tune our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

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

## DIVERSITY: THERE IS NO "LGBT MARKET"

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

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

continues...

## **TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE**

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

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

## **WE DON'T OUTSOURCE!**

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

*Some firms work as representatives of research companies, or outsource clients' projects, and report on the results of the 3rd party's work. But without being intimately involved in every aspect of the project, from discussing the client's goals and designing the study, to building the survey, implementing it and writing the report, and without engaging directly with consumers in focus groups, it is difficult to gain the insights that can only come from CMI's hands-on LGBT research specialization over 15 years.*

## **TRUSTED**

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

## **PROUDLY LGBT-OWNED AND -OPERATED**

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

## **COMMUNITY CITIZENSHIP**

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

## **VALUE**

You'd think that with this kind of specialization and experience, you'd be investing considerably more for CMI research than for studies from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 50+ years of dedicated LGBT research among the CMI team, that we can actually keep your costs low. We are not spending your money to locate qualified survey or focus group participants, nor are we spending our time (or your money) trying to source comparative data or case studies. We've done all that over the past 17 years for your benefit. And we are not running a large operation that juggles many accounts and projects of differing scope and focus. CMI's client dedication and market specialization delivers you superior intelligence at a fraction of the cost of other firms.