

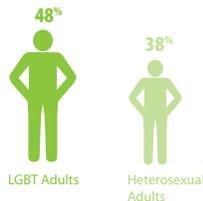
The Lesbian, Gay, Bisexual and Transgender (LGBT) Population At-A-Glance

Since 2000, Harris Interactive has been the leader in LGBT market research, and through a strategic partnership with Witeck-Combs Communications – the leading LGBT marketing communications firm – offers actionable and authentic survey research on this community. Together, we have created the largest and most sophisticated online specialty panel of self-identified LGBT participants.

Through this unique panel and advanced online technology, it is possible to quickly, accurately and cost-effectively ask LGBT consumers and households their opinions about public issues, consumer purchases, and their acceptance of leading brands in the market, while providing a comparative non-gay sample drawn from the world's largest panel of respondents. Companies, organizations and academic researchers can now rely not on hunches, anecdotes or stereotypes, but instead on sound, proprietary data to develop effective marketing and communications strategies.



In 2000, the US Census captured invaluable details about same-sex couples and their demographics, which was recently updated in the 2010 Census. Together with up-to-date market data, we have the means to provide a far more complete picture of the LGBT marketplace.



Purchasing Behavior

Nearly half (48%) of lesbian and gay adults report they like to keep up with the latest styles and trends, compared to only 38% of heterosexual adults.

Source:
Witeck-Combs Communications/Harris Interactive, July 2008

More Details

To find out more about our understanding of the LGBT population, visit our website:
www.harrisinteractive.com

In partnership with:



Some recent highlights about this valuable and increasingly visible consumer audience:

Size of Market and Buying Power

- 6.8% of Americans over the age of 18 – roughly 15 to 16 million people – self identify as lesbian, gay, bisexual or transgender.
- The buying power of this segment for 2010 was projected to be \$743 billion.

Source: *Packaged Facts/Witeck-Combs Communications 2010*

Advertising and Brand Loyalty

- 88% of lesbian and gay adults and 70% of heterosexuals are likely to consider a brand that is known to provide equal workplace benefits for all of their employees, including lesbians and gays. (February 2007)
- Lesbians and gays also are more likely to ask for a specific brand when ordering alcoholic beverages (60%) compared to 42% of heterosexuals. (February 2007)

Purchasing Behavior

- Nearly half (48%) of lesbian and gay adults report they like to keep up with the latest styles and trends, compared to only 38% of heterosexual adults. (July 2008)
- About two-thirds (66%) of all LGBT adults reported that they would be very or somewhat likely to remain loyal to a brand they believed to be very friendly and supportive to the lesbian, gay and transgender community – even when less friendly companies may offer lower prices or be more convenient. (September 2007)

LGBT Population At-A-Glance

NOTE: This LGBT data was derived from Harris Poll OnlineSM surveys from 2002 to 2010. To ensure the data is representative of the general population of LGBT adults, the data is weighted using targets based on a combination of U.S. Census data and data obtained from previous Harris Interactive research. In addition, Harris Interactive has also developed and uses a proprietary technique called "propensity weighting" that is designed to reduce possible bias in online surveys allowing more accurate projections results to the LGBT population at large. Online research is especially useful for hard to reach populations such as lesbians and gays because of its high standards of anonymity, privacy and confidentiality.

Harris Interactive believes, based on experience, that sound LGBT marketing and communications strategies are based on an accurate analysis of identifiable subsets of the LGBT market - not overblown demographic assumptions or stereotypes about the entire population.

That's why in 2000 we partnered with Witeck-Combs Communications, the nation's premier strategic marketing communications and public relations firm with unmatched expertise in the LGBT community. For the past 17 years, Witeck-Combs has pioneered strategic communications and marketing consulting in the LGBT market for many Fortune 500 brands.

Together, Harris Interactive and Witeck-Combs Communications offer clients greatest depth of expertise and experience in the LGBT segment. Why don't you put their knowledge to work for you?

Contact Us

If you are interested in the LGBT market, Harris Interactive is the place to come for answers. We have the experience you can trust to better understand and market to these populations.

To learn more, please call **877.919.4765** or visit our website at www.harrisinteractive.com

For more information on our strategic partner Witeck-Combs Communications, please visit www.witeckcombs.com or call **202.887.0500 Ext. 14**

Health and Fitness

- When asked if they smoked, 25% of lesbians said they were smokers compared to 19% of heterosexual women who said they were smokers. (November 2008)
- When asked, 22% of lesbian and gay survey respondents reported having no health insurance, compared to only 12% of heterosexual adults in the survey. (May 2008)

Travel

- LGBT consumers report on average they were likely to spend about \$2,300 between May and August 2009 for both leisure and business travel, while heterosexuals on average said they were likely to spend about \$1,500 during that same period. (May 2009)
- With regards to air travel, compared to a year ago - 6 out of 10 (62%) of LGBT respondents stated they would stay the same (55%) or increase (7%), while only 36% of heterosexuals also said they will stay the same (27%) or increase them (9%). (May 2009)

Finances

- In the next 6 months just looking at lesbian and gay adults, 31% expect their household's financial condition to be better, compared with 24% of heterosexual adults. (September 2009)
- One-third (33%) of LGBT consumers cite the Internet as a source for financial information they use often, while only 26% of heterosexuals concur. (July 2008)

Technology/Media Consumption

- More than half (55%) of lesbian and gay respondents reported reading some type of blog, compared with only 38% of heterosexuals. (May 2009)
- Slightly more than half (55%) of lesbian and gay adults state they are members of Facebook, compared with 46% of heterosexual adults, while 23% of lesbian and gay respondents reported being members of LinkedIn, while only 13% of heterosexual adults stated they are members. (May 2009)

Public Policy

- 86% of heterosexual adults strongly or somewhat agree that how an employee does his or her job should be the standard for judging an employee, not their sexual orientation. (August 2009)
- Two-thirds (67%) of LGBT adults say that things in the country are going in the right direction, compared to 45% of heterosexual adults. (August 2009)

Insurance

- When asked what reasons they might use for switching their auto insurance from one company to another, a third (33%) of self-identified lesbians and gays said that offering domestic partner benefits to its employees would be one of their top three reasons they would change providers and take their business to another insurance carrier. (February 2008)
- Almost half of lesbian and gay adults (49%) have no life insurance policies whereas just under one third (32%) of heterosexuals claim to have none. (February 2008)

Pets

- 90% of gay pet owners say their pet is a member of their family, and two thirds have bought their pets presents for the holidays. (December 2007)
- Seven out of ten (71%) LGBT adults today say that they own pets, compared with 63 % of heterosexual adults. (December 2007)

