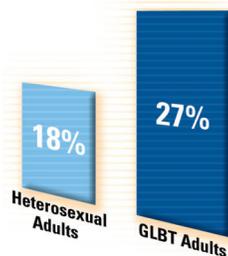


The Gay, Lesbian, Bisexual and Transgender (GLBT) Population At-A-Glance



Purchase Decision Based on Advertising and Brand Loyalty

Number of GLBT adults who always ask for brand names when ordering alcoholic beverages versus heterosexuals.

Source: Witeck-Combs Communications/Harris Interactive, 2004

More Details

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

In partnership with



Since 2000, Harris Interactive has been the leader in GLBT market research, and through a strategic partnership with Witeck-Combs Communications – the leading GLBT 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 GLBT participants – approximately 45,000 individuals and growing.

Through this unique panel and advanced online technology, it is possible to quickly, accurately and cost-effectively ask GLBT 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. Together with up-to-date market data, we have the means to provide a far more complete picture of the GLBT marketplace. Harris Interactive's data has been extensively utilized in MarketResearch.com's Packaged Facts/Witeck-Combs Communications report on the US Gay and Lesbian Market. This data analysis provides corporate marketers with additional marketing trends and key insights about the GLBT consumer's buying power.

Some recent highlights from Harris Interactive research 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 million people – self identify as gay, lesbian or bisexual.
- There are over 3 million same-sex couple households.
- Nearly one in four (24%) gay men and lesbians live in households with children under the age of 18.
- The buying power of this segment is expected to be \$690 billion in 2007.

Source: Packaged Facts/Witeck-Combs Communications 2007

Advertising and Brand Loyalty (November 2003, December 2004)

- 4 out of 10 gay consumers– quality and value being equal – prefer to purchase products from companies that advertise in gay and lesbian media.
- 46% prefer products from companies that support nonprofits serving the gay and lesbian community over competing products that do not.
- When ordering alcoholic beverages, 27% of gay consumers always ask for brand names, (i.e. “Absolut and soda” versus “vodka and soda”), vs. 18% of heterosexual consumers.
- 42% of GLBT individuals say advertisements read online influence purchasing decisions for one product or service over another, versus only 35% of non-gays.

Purchasing Behavior (March, June, September, December 2004; February 2006)

- 69% of GLBT adults indicated their shopping decisions – other things being equal such as price, value, or quality – would likely or very likely be influenced by a “buyer's guide” of companies whose workplace policies objectively support equal and fair treatment of GLBT people.
- 55% of GLBT consumers choose to do business with companies that they know have a commitment to diversity and equal treatment of employees, versus 34% of non-gays.
- 33% of GLBT consumers use the Internet when they want to learn more about a product or service, versus 26% of non-gays.



NOTE: This GLBT data was derived from Harris Poll OnlineSM surveys from 2002 to 2006. To ensure the data is representative of the general population of GLBT 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 GLBT 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.

Contact Us

If you are interested in the GLBT 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/GLBT

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

83% of those who self-identify as gay or lesbian consider themselves out.

Witeck Combs/Harris Interactive, 2004

- GLBT consumers are less likely (30%) to switch mobile service providers due to price than their non-gay counterparts (41%).
- 24% of GLBT adults often or always like to keep up with the latest styles and trends, versus 17% of non-gays.

Health and Fitness (January 2005)

- Health insurance coverage (34%) and HIV/AIDS (17%) are the two health issues that GLBT adults think deserve the most attention from health care professionals and policy makers.
- Three times as many (18%) GLBT adults are worried about depression/anxiety as a personal health risk in comparison to only 6% of heterosexuals.
- Three quarters of lesbians (74%) who have experienced discrimination at a doctor's office believe they were discriminated against because of their sexual orientation.

Travel (March 2005, January 2006)

- 82% of GLBT consumers make hotel reservations online, versus 65% of non-gays.
- 34% of GLBT consumers say that using a travel-related website contributes to their decisions about leisure travel destinations, versus 25% of non-gays.
- 14% of gay and lesbian adults say that for their next vacation, they are planning to travel to an overseas destination, versus 7% of non-gays.

Financial Services (May 2005, July 2006)

- 82% of GLBT adults would reinvest their money into checking, savings, or money market accounts if they were to earn \$100,000 due to investing, versus 68% of non-gays.
- When deciding where to conduct their business, 60% of gay men and lesbians say that it is important that a financial services institution provide services through the Internet, versus 50% of non-gays.
- 48% of GLBT adults would prefer to bundle their financial services and products from one financial institution or broker/representative, if there were little difference on price, quality and function of the products and services, versus 39% of non-gays.

Technology (September 2004)

- 79% of GLBT adults own a wireless or cellular telephone versus 72% of non-gays.
- 16% of GLBT households currently own a television with high-definition resolution (HDTV), versus 9% of non-gays.

Media Consumption (March 2005)

- 68% of GLBT viewers subscribe to premium cable channels such as HBO, Showtime or Cinemax compared to only 54% of non-gays.
- 67% of GLBT individuals say they read independent and alternative newspapers compared to 50% of non-gays.

Public Policy (September 2004, May 2006)

- 69% of heterosexual adults agree that, regardless of one's sexual orientation, all employees are entitled to equal benefits on the job.
- A majority of heterosexual adults (61%) agree that a company should have the freedom to decide for itself the benefits it offers its employees and their spouses or partners.
- 55% of heterosexual adults believe adoption assistance such as counseling and financial benefits should be available to all employees regardless of sexual orientation.
- 35% of GLBT adults have faced some form of discrimination on the job, including being fired, harassed, pressured to quit or denied a promotion because of their sexual orientation or gender identity and expression.