



Community Marketing, Inc.

Gay Market Research +
Development Lab®

Rivendell
the gay media company!

Gay Consumer Index™ 2007 USA Gay Male Abstract n=12,044

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

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

12,044 respondents who identified themselves as gay men and reside in the United States completed this survey in the 34 day period from April 13, 2007 through May 16, 2007. The margin of error for a sample of 12,044 is 1% at a 95% confidence interval. Respondents were sourced thorough Community Marketing's proprietary survey pool and through partnerships with over 75 LGBT (lesbian, gay, bisexual, transgender) magazines, newspapers, websites and event organizers throughout the United States. To encourage completion of the survey, respondents were offered an incentive to win one of four travel vouchers good for travel in North America (value estimated at \$500 each). Survey respondents totalled over 25,000, and a parallel *Lesbian Consumer Index*™ (n=10,380) report has also been published, representing US lesbian consumers.

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

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

Respondent demographics

Median age: 45
- Under 30: 10%
- Over 55: 17%

46% are in relationships and living together, and 43% are single.
5% have children under age 18 living in home.
61% have a pet; 28% a cat and 38% a dog

Occupation

Work in the Medical / Health Industry: 8%
Work in Education: 6%
Work in Legal/Government: 6%
Retired: 7%

Home ownership

Own residence: 61%
Rent residence: 36%

Income

Median annual household income: \$83,000
- Singles \$62,000
- Couples living together \$130,000

Representative cross-section:

Respondents are well distributed throughout the United States, with the largest percentages residing in California, New York, Texas, Florida, and New England.

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What gay men do with their time

- Spend 12 hours per week of personal time (not work) on the Internet.
- 95% made purchases on the internet in the last year, and 81% use the internet for banking and bill paying.
- Watch TV for 10 hours per week. US gay men show the most likelihood of watching the major networks: NBC, ABC, CBS and Fox, followed by cable channels Bravo and gay-focused Logo.

Active in politics and community

- 84% voted in the 2006 mid-term election
- 92% voted in the 2004 Presidential election
- 40% contributed to a political party in the last year
- 24% attend a community fundraising event monthly
- 36% believe political leaders should "Continue the fight for gay and lesbian marriage equality. It should be a priority."

Communications

- US gay men are most likely to read national gay-specific publications and local gay publications, and mainstream publications that cater to a specific topic.

Social and entertainment

- 88% go out to dinner with friends at least monthly
- 72% of respondents consume at least one alcoholic beverage per week at a bar or restaurant. The median number consumed by those who have at least one drink is 4 drinks.
- 66% go shopping at brick and mortar stores at least monthly
- 63% go to see a movie at least monthly
- 53% work out in a gym at least monthly
- 50% go to a club or bar at least monthly
- 39% attend live theater at least monthly
- 24% attend a music concert at least monthly
- 24% visit a museum at least monthly
- 22% visit the beach at least monthly
- 20% go dancing at least monthly
- 13% attend a live sporting event at least monthly

Psychographics and motivations

- 89% are more likely to support companies with favorable LGBT employment practices.
- 88% are more likely to support companies that sponsor LGBT events and fundraisers.
- 85% consider advertising in LGBT publications to be a favorable motivator to purchase.
- 77% believe that increasing corporate recognition of the "buying power" of the LGBT community has been advantageous in advancing LGBT causes... *but* 73% believe that homosexuality will still be a divisive issue in the US in 10 years.
- 60% prefer that marketers refer to the "community" as "Gay & Lesbian" in their communications.

Purchases: How gay men spend their money

- 80% purchased with a Visa credit card in the last month
- The median US gay male respondent spent \$5,200 dining out in the last year, with a median of 4 times per week and a median of one of those in a fine dining establishment.
- Downloaded music or video from the internet: 46% purchased in the last year
- Cell Phone: 37% purchased in the last year
- Home computer or laptop: 30% purchased in the last year
- MP3 player (e.g. iPod, Creative, etc.): 26% purchased in the last year
- Digital camera or video recorder: 21% purchased in the last year
- HD or plasma TV: 20% purchased in the last year
- Video recorder/DVR (such as TiVo): 17% purchased in the last year
- Satellite Radio: 11% purchased in the last year
- PDA (e.g. Palm, Blackberry, etc.): 10% purchased in the last year
- Travel: median \$2,000 per year
- 25% consulted a retail travel agent in the last year
- Clothing: median \$500 per year
- Coffee drinks: median \$260 per year
- Bottled water & sports drinks: median \$260 per year

Automobile ownership

- 88% own an automobile
 - Own an SUV: 31%
 - Own a mid-size car: 27%
 - Own a luxury car: 21%
 - Own an economy car: 21%
 - Own a truck: 14%
- Length of ownership of automobile: 5+ years
- Motivated by purchase price: 52%
- Motivated by fuel efficiency: 38%
- Motivated by model's reliability: 34%
- 4% said they purchase a new car at least every two years
- Those who purchase a new car every two years are less concerned about fuel efficiency, and more concerned about safety features

Health, Fitness and Retirement

- 30% got a massage in the last month
- 16% went to a spa in the last month
- 65% take a daily vitamin supplement
- 92% know their HIV status
- 11% of respondents born between 1950 and 1969 indicate they would move to a LGBT retirement community when they retire.

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

Please visit www.CommunityMarketingInc.com for more information about the *Gay Consumer Index™*, and to order the full 100+ page report. Also available is the parallel *Lesbian Consumer Index™* study of 10,380 US lesbian consumers. Full reports contain data, graphics, analysis, observations, comparisons, commentaries from community leaders, and practical recommendations based on Community Marketing's 15 years of market research and client services leadership in this dynamic market segment. Community Marketing also offers Cross-Tab reports derived from the *Gay Consumer Index™*, and provides custom survey, focus group and field study services.

Connecting our Clients with the Gay & Lesbian Community Since 1992
Thomas E. Roth, MBA, President

Community Marketing is pleased to present our historic new studies

Gay Consumer Index™ Lesbian Consumer Index™

Breakthrough Market Research Insights and Intelligence

Since 1994, Community Marketing, Inc. (CMI) has been expanding and diversifying our global gay and lesbian community knowledge base. An unprecedented 25,000 participants, split almost evenly between gay men and lesbians, have completed the CMI Gay & Lesbian Consumer Index survey, resulting in the most comprehensive and truly representative LGBT market research in the world. The *Gay Consumer Index™* and the *Lesbian Consumer Index™* include ground-breaking quantitative data and deep insights on demographics, psychographics, purchase behavior and motivations, and social and political perspectives.

For over a decade, CMI's proprietary market data and experience-based interpretation have provided a powerful foundation for LGBT marketing initiatives around the world. In the past year alone, CMI collected and analyzed *over 50,000 gay and lesbian survey responses*, and we have produced and published specialized survey, focus group and field research reports for a wide variety of clients. Frequently quoted in publications such as the *New York Times*, *USA Today*, *Wall Street Journal*, *Chicago Tribune*, *Los Angeles Times* and numerous others, Community Marketing's research can bring your organization a statistical basis for development, growth and leadership in gay and lesbian markets.

UNDERSTANDING YOUR MARKET SIZE & OPPORTUNITIES

Toss out your assumptions. There is no "gay market." There are gay and lesbian markets—and quite a diversity of them. Today, marketing is about segmentation and personalization. Gays and lesbians want to be reached on a personal level, according to individual interests and preferences. CMI's *Gay Consumer Index™* and *Lesbian Consumer Index™* reports provide the insights and market intelligence you need to make an informed and productive marketing investment.

ORDER TODAY

Your name _____ Title _____
 Company or Organization _____
 Address _____ City _____ St _____ Zip _____
 Tel _____ Fax _____ email _____

Full Report: Contains data, expert analysis, color charts and an executive summary of key findings.

Combined Full Study: USA Gay & Lesbian Consumer Index (n=22,388): \$1,850 \$ _____
 (or) USA Lesbian Consumer Index: (n=10,344): \$975 \$ _____
 (and/or) USA Gay Consumer Index: (n=12,044): \$975 \$ _____

Cross-Tab Reports: Sub-set profile reports derived from the full profile.

USA Lesbian Young Adult Cross-Tab (Age 18-29; n=1,407): \$1,250 \$ _____
 USA Gay Young Adult Cross-Tab (Age 18-29; n=1,338): \$1,250 \$ _____
 USA Lesbian Senior Cross-Tab (Age 55+; n=1,259): \$1,250 \$ _____
 USA Gay Senior Cross-Tab (Age 55+; n=1,808): \$1,250 \$ _____
 Payment in US funds. Thank you. **Total \$** _____

Please contact me to discuss custom Cross-Tab reports, or custom research studies (surveys and/or focus groups).

Please mail with US funds check payable to "Community Marketing, Inc." (address below) or fax with credit card info to 415/552-5104.

Charge: Visa/MC/Amex # _____ Exp date _____ Signature _____