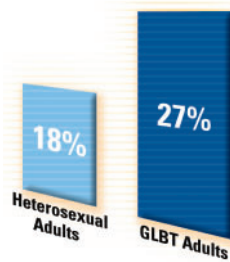


The Gay, Lesbian, Bisexual and Transgender (GLBT) Population At-A-Glance



Purchase Decision Based on Advertising and Brand Loyalty

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

More Details

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

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 40,000 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 U.S. 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 U.S. 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 \$610 billion in 2005, and \$641 billion in 2006.

Source: Packaged Facts/Witeck-Combs Communications 2004

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 GLB 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)

- 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.
- GLBT consumers are less likely (30%) to switch mobile service providers due

In partnership with





NOTE: This GLBT data was derived from Harris Poll OnlineSM surveys from 2002 to 2005. 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 bias in online surveys and allows for accurately projecting results to the general GLBT population. Online research is especially useful for hard to reach populations such as lesbians and gays because of its high standards of 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

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

to price than their non-gay counterparts (41%).

- Buying consumer products and services was one of the top two reasons for using the Internet for 22% of GLBT individuals versus only 17% of non-gays.
- 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)

- 34% of GLBT consumers say that using a travel-related website contributes to their decisions about leisure travel destinations, versus 25% of non-gays.
- 58% of GLBT consumers say they learn about future leisure travel destinations from friends, relatives or personal experience.
- 82% of GLBT consumers make hotel reservations online, versus 65% of non-gays.

Financial Services (May 2005)

- 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.
- 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.
- Seven out of ten (71%) GLBT adults versus 59% of non-gay respondents say "It is important to me to know that a financial institution does not discriminate."

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)

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

Public Policy (September 2004)

- 64% of heterosexual adults say that employees with same-sex partners should be equally eligible for key workplace benefits available to spouses of married employees.
- 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 GLB 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.