2012 LGBT Community Survey®

U.S. Overview Report of Bisexual Community
July 2012
LGBT is a market segment that simply shouldn’t be ignored. The social and political landscape is evolving rapidly, and developing a clear, actionable understanding of this dynamic and influential demographic has never been more important for your brand.

Utilizing quantitative and qualitative market research methodologies, Community Marketing helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

CMI has been a leader in LGBT marketing and insights since 1992, and my team looks forward to being your strategic partners.

Thomas Roth, President
Community Marketing, Inc.
www.CommunityMarketingInc.com
CMI’s 6th Annual LGBT Community Survey

Thanks to our 2012 Sponsors & Partners
In partnership with Rivendell Media, CMI’s 2012 LGBT Community Survey respondents were referred from 150+ global LGBT media partners, events and organizations

- 103.9 PROUD FM
- Adelante Magazine
- Advocate.com
- Affirmations
- afterellen.com
- afterlon.com
- AMERICABlog
- Aqua Foundation for Women
- B Magazine
- Baltimore OUTloud
- BARTab
- Bay Area Reporter
- Bay Times
- Bay Windows
- BBCM Foundation
- Bey-Clarke Media Group
- Bisexual Resource Center
- Bleu Magazine
- Boyculture
- Brunos.de
- Camp Magazine
- CenterLink: The Community of LGBT Centers
- Central Voice Newspaper
- ChicagoPride.com
- Clubsanook.com
- Community Marketing, Inc.
- Compete Magazine
- CUE MAGAZINE INC
- Curve Magazine
- Dallas Voice
- Damron Gay Travel Guides
- David Magazine
- De Magazine
- Delta Foundation of Pittsburgh
- DesiBoys
- DowneLink.com
- Echelon Magazine
- EDGE Media Network (edgeatlanta, edgelosangeles, etc.)
- Equally Wed
- Erie Gay News
- Fab Magazine
- fabmagazine.com
- FENUXE Magazine
- FlawLes Media
- Frontiers Magazine
- GA Voice
- Gay Ad Network
- Gay Calgary Magazine
- Gay City News
- GAY to Z Directory
- Gay.com
- Gay.net
- Gayborhood
- GayCities
- Gaynewsnetwork.com.au
- Gaypedia
- Gayromeo.com
- GayWhistler
- Gayyellow.com
- GLCCB/Gay Life
- Grab Magazine
- Greg in Hollywood
- Grindr
- GuideMag.com
- Hello Media
- Hotspots Magazine
- Hunk du jour
- Instinct Magazine
- International Federation of Black Prides, Inc.
- InterPride
- ION Arizona Magazine
- Just Circuit Magazine
- Just Out Newspaper
- Kenneth in the 212
- LA PRIDE/Christopher St. West
- Lesbian Mom Today
- Lesbian News (LN)
- Lesbian.com
- LGBT Community Center (NYC)
- LGBT Weekly
- Logotv.com
- Männer
- Metro Weekly
- Metrosource Magazine
- New Mexico GLBTQ Centers
- NewNowNext.com
- Next Door Magazine
- NEXT Magazine
- noizè Magazine
- OMG Blog
- OneGoodLove
- Our Lives Magazine
- Out & About Newspaper
- Out Front Colorado
- Out In Jersey, Inc.
- Out.com
- OutServe
- OutSmart Magazine
- Outwords, Inc.
- Pink Banana Media
- Pink Pages
- Pittsburgh’s Out / outonline.com
- Pride Card, The
- Pride Source Media Group
- PurpleDrag.com
- Q-Notes (Pride Publishing & Typesetting)
- Queer.de
- Queerid
- Queerty, Inc.
- Rage Monthly, The
- Rainbow Times, The
- Rainbow.travel
- San Diego Gay & Lesbian News
- San Diego Pix Magazine
- SheWired.com
- SoCal Social Club
- Social House Media Group
- Spartacus Traveler
- Spartacusworld.com
- SquareHippies
- Squirt.org
- Staten Island LGBT Community Center
- Stonewall Columbus/ Columbus Pride
- Sweet
- TAG / TAG Approved Accommodations
- Telluride Gay Ski Week
- The New Civil Rights Movement
- TLA Entertainment
- Tom on Tour
- Towleroad
- Travel Gay Canada
- Triangle Black Pride
- Unicorn Booty
- Utopia-Asia.com
- Washington Blade
- Watermark Media, Inc.
- Windy City Times
- Wisconsin Gazette
- Women's eNews
- Xtra! Ottawa
- Xtra! Toronto
- Xtra! Vancouver
- xtra.ca
The Community Marketing, Inc. (CMI) LGBT Market Research + Development Lab® has been conducting LGBT consumer research since 1994. Our practice includes online surveys, telephone interviews, intercepts, focus groups (on-site and online), and advisory boards in North America and Europe. Industry leaders around the world depend on CMI’s research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.


CMI’s research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: Wells Fargo Bank, Target Brands, ABSOLUT Vodka, MetLife, United States Census Bureau, Travelocity, American Cancer Society, Gallo Wineries, Kaiser Family Foundation, Hyatt Hotels, Japan National Tourism Organization and numerous other corporations and organizations across North America and around the world.
Our 6th Annual LGBT Community Survey continues to be one of the most comprehensive studies available focusing on LGBT consumers

Who Did We Talk To?

• Over 45,000 total respondents across 148 countries. The survey was available in English and German (with additional languages to be added in 2013).

• This report focuses on U.S. data for over 1,400 self-identified bisexual men and about 800 bisexual women

• Respondents were recruited from CMI’s proprietary research panel and 200+ LGBT media outlets, events and partner organizations

• Current gay and lesbian data and comparisons to 2011 data are available in our US overview report, available for download at CommunityMarketingInc.com

How Did We Talk To Them?

• 15 minute online survey conducted in May - June 2012

• Our mobile-optimized survey was made available through an email invitation to survey panelists, as well via the websites, email lists, instant messaging, mobile pop-ups, social media and community events of this year’s 150+ partners

• Importantly, our sample reflects the readership/membership of this broad range of LGBT focused media outlets, organizations and events. This means that the results summarized here are highly representative of LGBT consumers who are interacting with LGBT community media and events.
In This Overview...
Key Topics

- Technology & Lifestyle
- Brand Attitudes & Purchase Behaviors
- LGBT Marketing & Messaging
- Media Usage & Interaction With Advertising
- Politics & Fundraising
Interacting with technology?
Bisexual community members are avid tech users and are likely to own a variety of devices. Android phones are somewhat more popular than iPhones in the bisexual community.

Which of the following do you own?

<table>
<thead>
<tr>
<th>Device</th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital camera</td>
<td>67%</td>
<td>81%</td>
</tr>
<tr>
<td>Android smartphone</td>
<td>33%</td>
<td>44%</td>
</tr>
<tr>
<td>iPhone</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>E-reader (Nook, Kindle, Sony, etc.)</td>
<td>16%</td>
<td>29%</td>
</tr>
<tr>
<td>Digital camcorder (Flip, HD, etc.)</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>iPod Touch</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>iPad</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Blackberry smartphone</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Other WiFi / HotSpot enabled device</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Android tablet</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Windows smartphone</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Technology & Lifestyle

- Bisexual men and women are likely to say they rely on technology to help manage their hectic lifestyles.

### Attitudes About Technology & Lifestyle

<table>
<thead>
<tr>
<th>Statement</th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>I carry my cell phone or PDA everywhere I go</td>
<td>77%</td>
<td>75%</td>
</tr>
<tr>
<td>Technology helps make my life more organized</td>
<td>61%</td>
<td>63%</td>
</tr>
<tr>
<td>It is important to juggle various tasks at the same time</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>I am so busy, often I can’t finish everything I need to in a day</td>
<td>35%</td>
<td>44%</td>
</tr>
<tr>
<td>I’m among first of my friends to try new technology products</td>
<td>29%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
What they are buying and what influences them?

Brand Attitudes & Purchase Behaviors
Brand Attitudes

- Bisexual men and women are motivated more by trust and quality over brand names, and they’re willing to pay more for it. For brands that get it right, bisexuals are much more likely to become advocates and share with their friends.

**Attitudes About Brands & Shopping**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>If a company or brand impresses me, I will make a point of telling friends about it</td>
<td>61%</td>
<td>62%</td>
</tr>
<tr>
<td>I'll pay more for a product made by a company I trust</td>
<td>58%</td>
<td>59%</td>
</tr>
<tr>
<td>Price is more important to me than brand names</td>
<td>34%</td>
<td>40%</td>
</tr>
<tr>
<td>It is generally worth paying extra for top-of-line or cutting edge</td>
<td>27%</td>
<td>14%</td>
</tr>
<tr>
<td>I am influenced by what's hot and what's not</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Brand name is the best indication of quality</td>
<td>16%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Past Year Purchases

- Bisexual men’s and women’s purchasing habits are very similar findings to our gay male and lesbian report, with the only exception, bisexuals men and women are slightly less likely to purchase a major vacation.

Top Purchases, Past Year

<table>
<thead>
<tr>
<th></th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Phone</td>
<td>40%</td>
<td>35%</td>
</tr>
<tr>
<td>Major Vacation</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>HDTV</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>Furniture</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>Laptop</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Car</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>Tablet</td>
<td>16%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
**Average Spend – New Clothing**

- Bisexual men and women spend more on new clothing than the average for men and women nationally, but slightly less than gay men.

About how much have you spent on new clothes in the past 12 months?

- $500 or more

**Base:** 2012 Bisexual Men n=1,409; Bisexual Women n=818
Self Improvement Products & Services

- Bisexual men and women show a strong interest in self improvement products.
- Age plays a bigger role than gender in the type of self improvement products purchased.

**Top 10 Self Improvement Products or Services**

<table>
<thead>
<tr>
<th>Bisexual Men</th>
<th>Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamins</td>
<td>70%</td>
</tr>
<tr>
<td>Gym membership</td>
<td>40%</td>
</tr>
<tr>
<td>Paid educational classes of any kind</td>
<td>31%</td>
</tr>
<tr>
<td>Spa treatments / massages</td>
<td>29%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>15%</td>
</tr>
<tr>
<td>Erectile dysfunction medication (such as Viagra)</td>
<td>14%</td>
</tr>
<tr>
<td>Paid therapy or counseling</td>
<td>12%</td>
</tr>
<tr>
<td>Paid online dating service</td>
<td>12%</td>
</tr>
<tr>
<td>Personal trainer</td>
<td>10%</td>
</tr>
<tr>
<td>Yoga studio classes (outside of gym)</td>
<td>7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bisexual Women</th>
<th>Past Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamins</td>
<td>66%</td>
</tr>
<tr>
<td>Paid educational classes of any kind</td>
<td>44%</td>
</tr>
<tr>
<td>Spa treatments / massages</td>
<td>41%</td>
</tr>
<tr>
<td>Paid therapy or counseling</td>
<td>34%</td>
</tr>
<tr>
<td>Gym membership</td>
<td>29%</td>
</tr>
<tr>
<td>Yoga studio classes (outside of gym)</td>
<td>21%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>15%</td>
</tr>
<tr>
<td>Paid weight management program (such as Weight Watchers)</td>
<td>9%</td>
</tr>
<tr>
<td>Meditation instruction</td>
<td>8%</td>
</tr>
<tr>
<td>Paid online dating service</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Tobacco Use

- Bisexual and gay men smoke in similar numbers. However, bisexual women are less likely to smoke than lesbians, 9% to 14%.

Do You Use Tobacco Products?

Bisexual Men
- Yes: 18%
- Sometimes: 13%
- No: 69%

Bisexual Women
- Yes: 9%
- Sometimes: 12%
- No: 79%

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Alcohol Consumption

• The drinking behavior of bisexual men and women is far more similar to gay men and lesbians than the general population.

<table>
<thead>
<tr>
<th></th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beer</td>
<td>4.4</td>
<td>2.7</td>
</tr>
<tr>
<td>Wine</td>
<td>2.2</td>
<td>2.2</td>
</tr>
<tr>
<td>Sparkling Wine/</td>
<td>0.5</td>
<td>0.4</td>
</tr>
<tr>
<td>Champagne</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spirits/ Cocktails</td>
<td>4.3</td>
<td>2.3</td>
</tr>
</tbody>
</table>

Averages shown are estimates calculated from scaled survey data with a maximum of 25 drinks factored

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Bisexual Representation in Media

- Bisexual men and women are likely to see biphobic representations. While they are more likely to see these representation in the mainstream media, they also see them in the LGBT media.

**In the past year, how often have you seen...**

**Biphobic representations in the mainstream media**
- Often: 9%
- Occasionally: 35%
- Rarely: 29%
- Never: 27%

**Biphobic representations in the LGBT media**
- Often: 7%
- Occasionally: 28%
- Rarely: 33%
- Never: 32%

**Biphobic humor used in marketing or social media that sets bisexual people apart from the greater LGT community**
- Often: 7%
- Occasionally: 29%
- Rarely: 31%
- Never: 33%

*Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818*
Bisexual Representation in Media

- Bisexual women are far more likely than bisexual men to see or notice these representations in both the mainstream and LGBT media.

<table>
<thead>
<tr>
<th>Bisexual Women</th>
<th>In the past year, how often have you seen...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Often</td>
</tr>
<tr>
<td>Biphobic representations in the mainstream media</td>
<td>22%</td>
</tr>
<tr>
<td>Biphobic representations in the LGBT media</td>
<td>14%</td>
</tr>
<tr>
<td>Biphobic humor used in marketing or social media that sets bisexual people apart from the greater LGT community</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Bisexual Representation in LGBT Media

- Over half of bisexual men and women indicated that the rarely or never see bisexual identity and culture celebrated in the LGBT media.

<table>
<thead>
<tr>
<th></th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Often</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Rarely</td>
<td>35%</td>
<td>42%</td>
</tr>
<tr>
<td>Never</td>
<td>24%</td>
<td>13%</td>
</tr>
</tbody>
</table>

In the past year, how often have you seen...

Bisexual identity and culture celebrated in the LGBT media

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Response to LGBT Terms in Corporate Marketing

• Compared to gay men and lesbians, bisexuals are less supportive of common terms used to describe the community. However, like gay men and lesbians, LGBT is the most favorable.

How you feel about each term when you see it used by a corporation?

(%) Favorable

<table>
<thead>
<tr>
<th>Term</th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>LGBT</td>
<td>78%</td>
<td>62%</td>
</tr>
<tr>
<td>Gay &amp; Lesbian</td>
<td>52%</td>
<td>43%</td>
</tr>
<tr>
<td>Gay-friendly</td>
<td>49%</td>
<td>49%</td>
</tr>
<tr>
<td>GLBT</td>
<td>60%</td>
<td>51%</td>
</tr>
<tr>
<td>Lesbian &amp; Gay</td>
<td>46%</td>
<td>42%</td>
</tr>
<tr>
<td>Rainbow (the image/ graphic)</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>Gay-welcoming</td>
<td>49%</td>
<td>35%</td>
</tr>
<tr>
<td>Everyone-welcoming</td>
<td>55%</td>
<td>54%</td>
</tr>
<tr>
<td>LGBTQ</td>
<td>71%</td>
<td>40%</td>
</tr>
<tr>
<td>Straight ally</td>
<td>50%</td>
<td>31%</td>
</tr>
<tr>
<td>&quot;Rainbow&quot; (the word)</td>
<td>37%</td>
<td>27%</td>
</tr>
<tr>
<td>Queer</td>
<td>38%</td>
<td>15%</td>
</tr>
<tr>
<td>LGBTQIA</td>
<td>34%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
### Influence on Purchase Decisions

- Most bisexual men and women are influences when a company outreaches through LGBT media or events.

#### Past 12 Months

<table>
<thead>
<tr>
<th></th>
<th>Advertises in LGBT media</th>
<th>Sponsors LGBT charities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bisexual Men</strong></td>
<td>20%</td>
<td>27%</td>
</tr>
<tr>
<td></td>
<td>45%</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Bisexual Women</strong></td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td></td>
<td>52%</td>
<td>44%</td>
</tr>
</tbody>
</table>

*Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818*
Influence on Specific Category Purchase Decisions: Bisexual Men

- Corporate LGBT outreach has a large impact on purchase decisions for bisexual men and women for travel related purchases, clothing, chain restaurants and personal care items also stand out.

In my purchasing decisions, a company's LGBT outreach influence was...
Among those who say they are strongly influenced

Base: 2012 Bisexual Men n=1,409
Influence on Specific Category Purchase Decisions: Bisexual Women

In my purchasing decisions, a company's LGBT outreach influence was...
Among those who say they are strongly influenced

<table>
<thead>
<tr>
<th>Category</th>
<th>Little</th>
<th>Moderate</th>
<th>Significant</th>
</tr>
</thead>
<tbody>
<tr>
<td>National chain restaurant</td>
<td>14%</td>
<td>10%</td>
<td>24%</td>
</tr>
<tr>
<td>Vacations / cruises / tours</td>
<td>18%</td>
<td>12%</td>
<td>22%</td>
</tr>
<tr>
<td>Hotel room booking</td>
<td>20%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>Clothing brand purchase</td>
<td>17%</td>
<td>12%</td>
<td>27%</td>
</tr>
<tr>
<td>Airline ticket purchase</td>
<td>14%</td>
<td>12%</td>
<td>27%</td>
</tr>
<tr>
<td>My bank selection</td>
<td>13%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Personal care (pain relief, lubricants, etc.)</td>
<td>12%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>Insurance services</td>
<td>13%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Vodka brand purchase</td>
<td>12%</td>
<td>9%</td>
<td>21%</td>
</tr>
<tr>
<td>Automobile purchase</td>
<td>13%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Smart phone purchase</td>
<td>14%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Beer brand purchase</td>
<td>14%</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Women n=818
How do you reach them most effectively?

Media Usage & Interaction With Advertising

Community Marketing, Inc.

LGBT Market Research + Development Lab®
Interaction with Advertising

- Facebook advertising response has now overtaken traditional banner advertising.

**In the past week, have you...?**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicked on a Facebook ad</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Clicked on a website banner ad</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Scanned a QR &quot;tag&quot; with your smartphone</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Clicked on a mobile app ad</td>
<td>19%</td>
<td>8%</td>
</tr>
<tr>
<td>Forwarded an advertisement to a friend</td>
<td>12%</td>
<td>14%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Media Consumption

- Bisexual men and women's media consumption habits between mainstream and LGBT media are complex, and communications through both are important.

### In the past week, have you read, viewed, or listened to...?

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainstream websites</td>
<td>53%</td>
<td>70%</td>
</tr>
<tr>
<td>Network / cable television</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>LGBT websites</td>
<td>34%</td>
<td>49%</td>
</tr>
<tr>
<td>Mainstream radio</td>
<td>38%</td>
<td>45%</td>
</tr>
<tr>
<td>Mainstream general newspapers</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td>Streaming video (TV or movies) on your computer</td>
<td>39%</td>
<td>45%</td>
</tr>
<tr>
<td>Mainstream magazines</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>LGBT publications for your city or region</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>LGBT blogs</td>
<td>18%</td>
<td>41%</td>
</tr>
<tr>
<td>Mainstream blogs</td>
<td>20%</td>
<td>41%</td>
</tr>
<tr>
<td>National LGBT magazine</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>LGBT email newsletters</td>
<td>13%</td>
<td>24%</td>
</tr>
<tr>
<td>Satellite radio</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Mainstream email newsletters</td>
<td>17%</td>
<td>23%</td>
</tr>
<tr>
<td>LGBT mobile apps (Grindr, GayCities, etc.)</td>
<td>22%</td>
<td>3%</td>
</tr>
<tr>
<td>Mainstream alternative newspapers</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>LGBT radio (on the air or streaming online)</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Media Consumption

• Over the past year, bisexual men and women indicated increasing their viewership of LGBT community websites. Most other viewing habits remained stable.

| Has your interaction with LGBT media (newspapers, websites, etc.) changed over the past 12 months? |
|---|---|---|
| **Increased** | **Same** | **Decreased** |
| **Reading LGBT newspapers** | Bisexual Men | 10% | 76% | 14% |
| | Bisexual women | 10% | 78% | 11% |
| **Reading LGBT national magazines** | Bisexual Men | 9% | 76% | 15% |
| | Bisexual women | 8% | 81% | 11% |
| **Visiting LGBT websites** | Bisexual Men | 29% | 61% | 9% |
| | Bisexual women | 41% | 51% | 8% |
| **Reading LGBT email newsletters** | Bisexual Men | 12% | 74% | 14% |
| | Bisexual women | 19% | 73% | 8% |
| **Reading LGBT blogs** | Bisexual Men | 19% | 67% | 15% |
| | Bisexual women | 33% | 60% | 7% |

* Not tracked in 2011

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Politics & Fundraising
Presidential Candidate Preference

- Overwhelmingly, bisexual men and especially bisexual women plan to vote for President Obama. However, a significant number of bisexual men indicated voting for other or not voting.

Who do you intend to vote for in the November presidential election?

<table>
<thead>
<tr>
<th></th>
<th>Barack Obama</th>
<th>Other/Not Voting</th>
<th>Mitt Romney</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bisexual Men</td>
<td>60%</td>
<td>29%</td>
<td>11%</td>
</tr>
<tr>
<td>Bisexual Women</td>
<td>85%</td>
<td></td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Obama Campaign Support

- Approximately 1 in 5 bisexual men and 1 in 4 bisexual women plan to donate cash to the Obama campaign; 1 in 5 already have.

How likely are you to support the 2012 Barack Obama presidential campaign?

- I plan to give a cash donation:
  - Bisexual Men: 20%
  - Bisexual Women: 24%

- I plan to volunteer my time for the campaign:
  - Bisexual Men: 20%
  - Bisexual Women: 23%

- I have already made a cash donation:
  - Bisexual Men: 20%
  - Bisexual Women: 22%

- I am already volunteering my time for the campaign:
  - Bisexual Men: 5%
  - Bisexual Women: 4%

- None of the above:
  - Bisexual Men: 50%
  - Bisexual Women: 45%

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
LGBT Fundraising

- Bisexual men and women are somewhat less likely to attend LGBT fundraising events than gay men (16%) and lesbians (12%).

Have you attended an LGBT fundraising event with a ticket price of $100 or more?

Past 12 Months

<table>
<thead>
<tr>
<th></th>
<th>Bisexual Men</th>
<th>Bisexual Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past 12 Months</td>
<td>8%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
LGBT Charitable Giving

- Bisexuals indicated that they give slightly less to LGBT causes than gay men and lesbians. The main reason indicated for not giving was that they were not asked.

Have you made a financial contribution to an LGBT-focused nonprofit organization during the past year?

Top Reasons to NOT Contribute

- Nobody asked me: Bisexual Men 44%, Bisexual Women 53%
- I’m not familiar enough with LGBT nonprofits: Bisexual Men 46%, Bisexual Women 50%
- I don’t feel connected to the LGBT community: Bisexual Men 33%, Bisexual Women 26%
- Other cause(s) are more important to me: Bisexual Men 20%, Bisexual Women 20%

Top Motivators to Contribute

- LGBT causes are important to me: Bisexual Men 55%, Bisexual Women 68%
- It’s important to give back to the community: Bisexual Men 45%, Bisexual Women 52%
- The organization is well-managed / will make good use of the money: Bisexual Men 50%, Bisexual Women 48%
- LGBT people have an obligation to support LGBT causes: Bisexual Men 35%, Bisexual Women 32%

Does not include contributions made as entrance fees to events like Pride, bar fund-raisers, sports teams, or other informal means.

Base: 2012 Bisexual Men n=1,409; Bisexual Women n=818
Find out more...

CMI has over 20 years of experience in the LGBT market research and communications specialty.

Contact us to learn more about acquiring analysis and reporting on the variety of topics explored in our Community Surveys, including:

- Occupation
- Media Consumption
- Living Environment
- Terminology
- Social Circle
- Brand ‘LGBT friendliness’
- Travel Behavior
- Motivations
- Networking Habits
- Sports and Recreation
- Custom Surveys, Focus Groups, Advisory Boards and other research methodologies

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Community Marketing, Inc. is an NGLCC Certified LGBT Owned Business Enterprise.
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 motivations and 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 20 years of experience and case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), with our proprietary panel of 60,000+ LGBT consumers; strategic consulting; marketing planning, and marketing plan implementation/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, there is no singular “gay market.” You’ll find singles, couples and families in every age and 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, “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® projects and training include:

- ABSOLUT (Pernod Ricard)
- American Cancer Society
- Blue Cross/Blue Shield
- Chicago History Museum
- E. & J. Gallo Winery / Barefoot Wines
- Farmers Insurance
- Greater Philadelphia Tourism Marketing Corporation
- Hyatt Hotels & Resorts
- Japan Air Lines
- Japan National Tourism Organization
- Kaiser Family Foundation (> Than AIDS campaign)
- Kimpton Hotels & Restaurants
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- Prudential Financial
- Switzerland Tourism
- Target Brands
- Travelocity
- Wyndham Vacation Ownership
- U.S. Government: Census Bureau, and HUD (Housing & Urban Development)
- Wells Fargo Bank
- And many others
Community Marketing, Inc.

CMI’S LGBT CONSUMER RESEARCH PANEL 2012

DID YOU KNOW…?
Gay men and lesbians own more homes and cars, travel more, spend more on electronics, and have the largest amount of disposable income of any niche market. And it’s a sizeable niche: LGBT consumers make up 5% or more of the U.S. consumer market. Community Marketing will help you connect with this influential demographic.

CMI’S LGBT CONSUMER PANEL: WHAT MAKES IT UNIQUE?

• Accurate, targeted market intelligence
Utilizing quantitative and qualitative market research methodologies, Community Marketing helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

• The largest, most representative panel
With nearly 20 years in business, Community Marketing has developed a research panel of more than 60,000 LGBT consumers. We’ve partnered with media outlets and LGBT-oriented organizations and events throughout the country and around the world to recruit a qualified panel that is geographically representative of the LGBT population.

• Candid responses, honest feedback
As an LGBT-owned and –operated firm, we’ve established trust with our panelists. We speak their language and know how to communicate effectively with them. As a result, our panelists are willing to talk with us frankly and frequently, even about sensitive issues.

• Community Marketing, Inc. Experience & Expertise
Since 1992, Community Marketing has provided market research, strategic consulting and marketing planning services to a wide variety of clients. We’ve provided LGBT consumer intelligence to numerous market leaders like Wells Fargo Bank, MetLife, ABSOLUT Vodka, Travelocity, MillerCoors Brewing Co., Stockholm Tourist Board, E&J Gallo Wineries, Chicago History Museum, Target Brands, Tourism Toronto, Hyatt Hotels & Resorts, Japan National Tourism Organization, NYC & Co., Farmers Insurance and many others, as well as the University of Pennsylvania, Kaiser Family Foundation and the U.S. Government (Census Bureau and H.U.D.).

We also present public and custom onsite educational seminars and workshops. In the past year, Community Marketing produced or presented at LGBT marketing symposia on four continents.

Learn more on our website, www.communitymarketinginc.com

46 MEDIAN AGE
49% LIVE WITH PARTNER
66% COLLEGE GRADUATES
81% CURRENTLY EMPLOYED
66% HHI >$50K
60% OWN A HOME
88% OWN A CAR
65% OWN A SMART PHONE
40% DRINK WINE AT HOME WEEKLY
69% ENJOY DRINKS AT BARS AND RESTAURANTS
SPEND $100 AT BARS & RESTAURANTS PER WEEK
37% MAKE PURCHASING DECISIONS AT WORK, AND MOST REFERENCE THEIR LGBT LOYALTIES IN THOSE PURCHASES
67% ARE ON FACEBOOK
12% BLOG DAILY

PAST 12 MO. PURCHASES
MAJOR VACATION 28%
AUTOMOBILE 18%
SMART PHONE 37%
LAPTOP COMPUTER 26%
HDTV 25%
FURNITURE 25%
PRIMARY HOME 6%
TABLET COMPUTER 14%
AND MORE!
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 LGBT Market Research + Development Lab® methodologies and experience are distinct from those of others when considering approaches, respondent panels—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 18+ 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, email broadcasts and social networks 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, 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 approach, attempting to “represent the gay community at large,” may be appropriate for direction in sociological or academic studies, but not for developing clear, representative advertising or marketing related strategies. Other researchers use lists from one or two LGBT publishers, which may skew results. For marketers desiring valid LGBT consumer insights about products, services, advertising creative and marketing strategies, these panel development approaches are not likely to yield LGBT community members who are interacting with 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. Through our work, 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 60,000 qualified LGBT consumers, the largest of its kind, by far. Our 4th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 100+ countries, 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 about “the gay market” 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 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

Since 1994, CMI has taken 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, Mexico, Australia, Britain and Germany, as well as many 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 produces and facilitates LGBT focus group studies and other qualitative research options. We have developed and reported on focus groups covering a wide variety of topics, plus we have operated telephone interviews, field surveys, advisory board series and multi-year customer satisfaction survey projects which can round out a comprehensive market intelligence plan.

Producing only online surveys, other research companies are telling half of the story (at best). 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 survey statistics 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 reps 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 spanning nearly two decades.

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 an NGLCC 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, GLAAD, 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 services than for research from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 60+ 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 18 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.

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