

# The 2012 LGBT Report: Demographic Spotlight

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Insights for reaching lesbian, gay, bisexual and transgendered consumers year-round



## Foreword

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June is the month when the United States and other countries around the world traditionally celebrate the lives and contributions of lesbian, gay, bisexual and transgendered citizens. While obstacles remain, the LGBT community has a growing number of reasons to be proud today. As a result, LGBT Americans are increasingly living their lives in the open and gaining the support of friends and family along the way. Marketers, too, are increasingly likely to show their support of their LGBT customers as they move their outreach efforts to this influential consumer segment out of the margins and into the mainstream.

In this report, we will:

- Report on the growing trend of consumers identifying as LGBT
- Track the rise in married gay and lesbian Americans
- Explore household arrangements and cohabitation
- Examine the earnings of lesbian, gay and heterosexual Americans
- Portion out the amount of money spent on discretionary goods and services
- Look at common attitudes towards shopping and advertising

For more information about the LGBT consumer, contact your Experian Simmons account manager or email [SimmonsMarketing@experian.com](mailto:SimmonsMarketing@experian.com)

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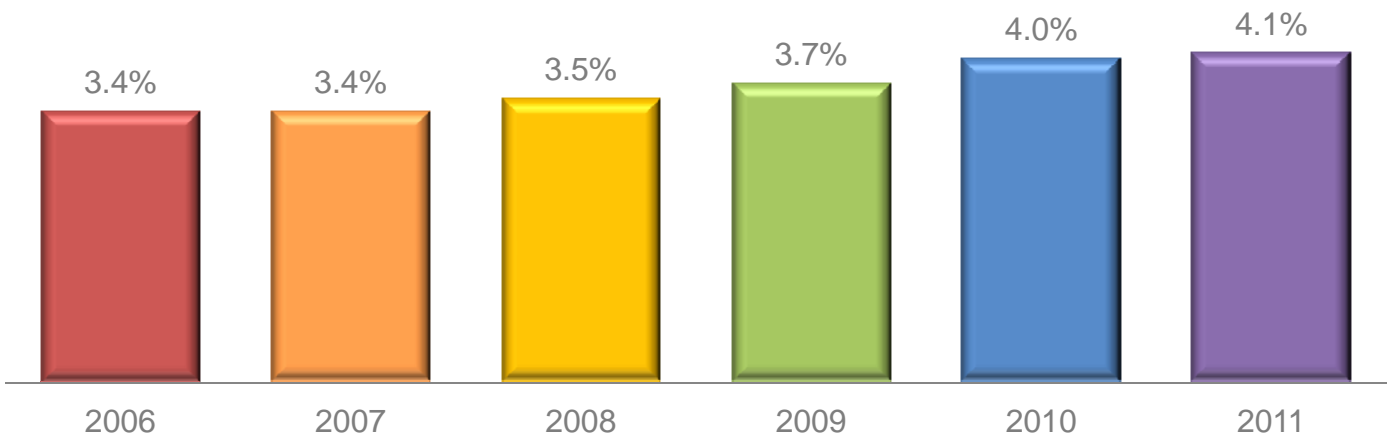
## Living out loud

### Adult Americans are increasingly likely to identify as LGBT

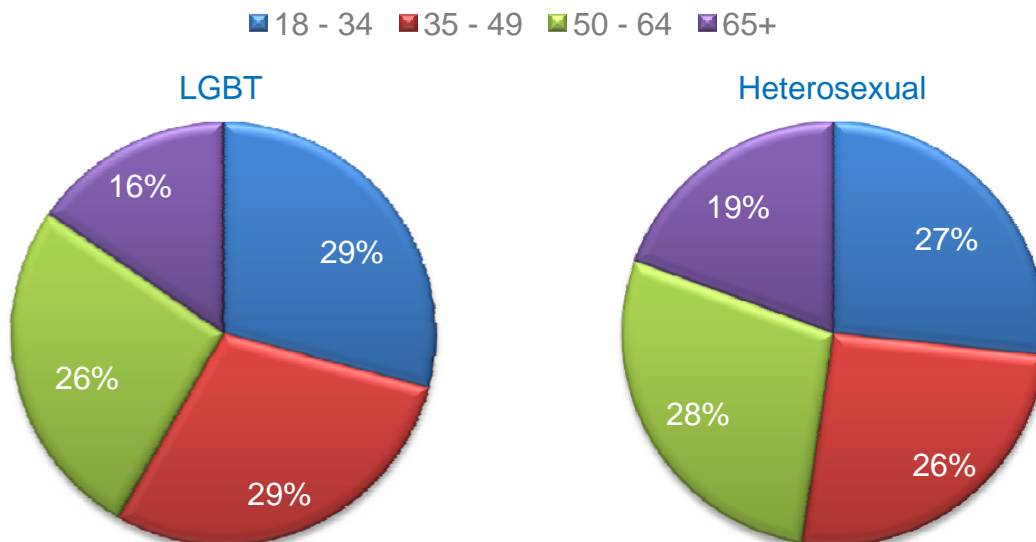
In 2006, when Experian Simmons first began measuring sexual orientation among respondents to our National Consumer Study, we found that 3.4% of all non-Hispanic adults self-identified as either lesbian, gay, bisexual or transgendered (LGBT) a figure consistent with what leading LGBT researchers predicted at the time. However, today, 4.1% of the non-Hispanic adult population self-identifies as LGBT, a figure that has risen slowly but steadily year-after-year.

Consistently over time, the adult LGBT population has predictably skewed towards the younger age cohorts. Specifically, 29% of LGBT adults are aged 18 to 34 versus 27% of the heterosexual population in that age range. Likewise, while 19% of heterosexual adults are age 65 and older, just 16% of LGBT adults are in this age range, though our data has shown a trend of the older segments growing in share among all LGBT adults.

Percent of non-Hispanic U.S. adults identifying as LGBT



Breakdown of LGBT and heterosexual population by age



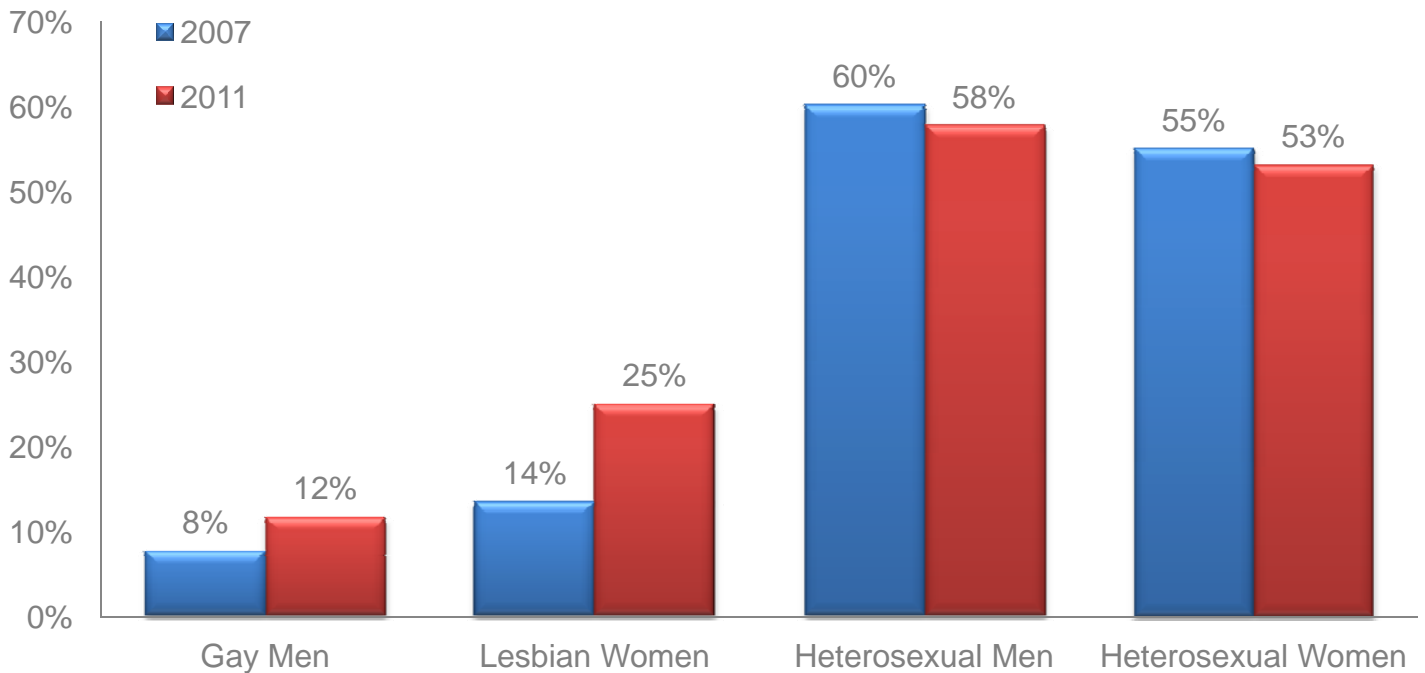
## Home and Family

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### Gay and Lesbian Americans increasingly wed

As a growing number of U.S. states pass laws recognizing same-sex marriages and civil unions, we see an increasing percentage of gay and lesbian Americans reporting that they are married. In 2007, for example, when only Massachusetts allowed same-sex marriage, 8% of adult gay men and 14% of adult lesbian women said they were married. Today, 12% of gay men and a full quarter of lesbian women are married. During the same timeframe, marriage rates among heterosexuals fell slightly. Today, 58% of heterosexual men and 53% of heterosexual women are married. Compare that to 60% of straight men and 55% of straight women who were married in 2007.

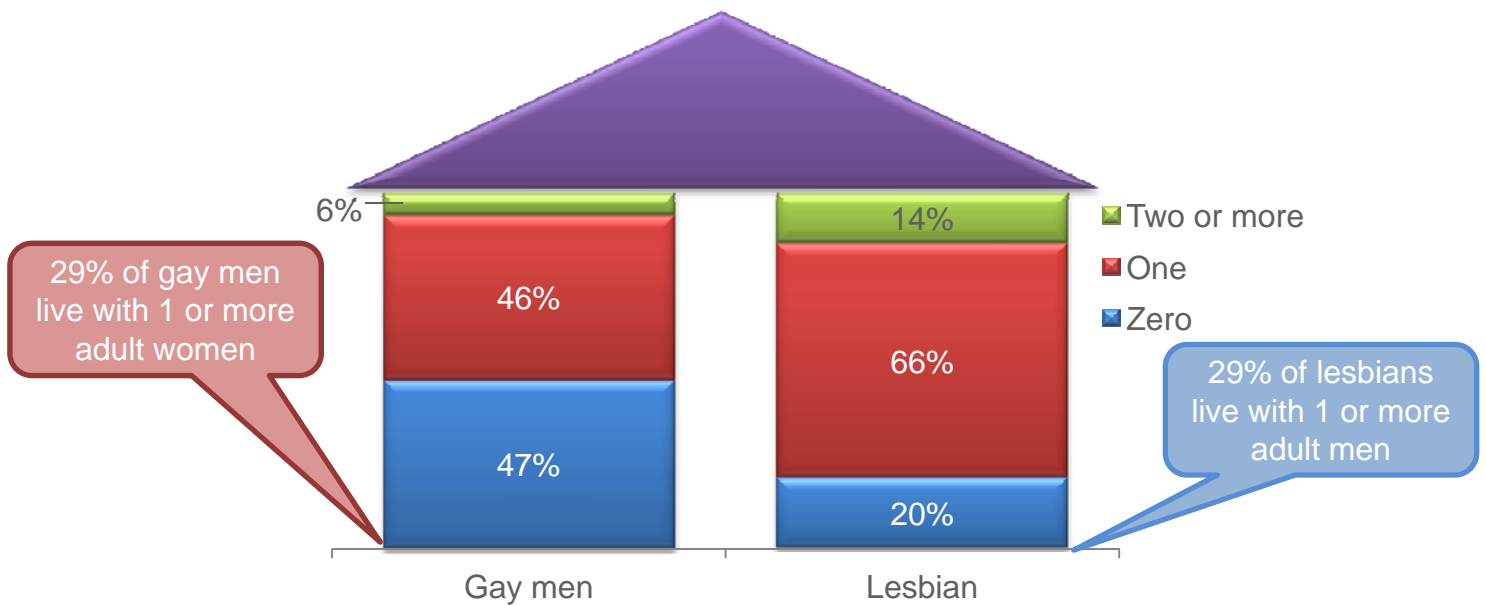
Percent of adults presently married, by sexual orientation



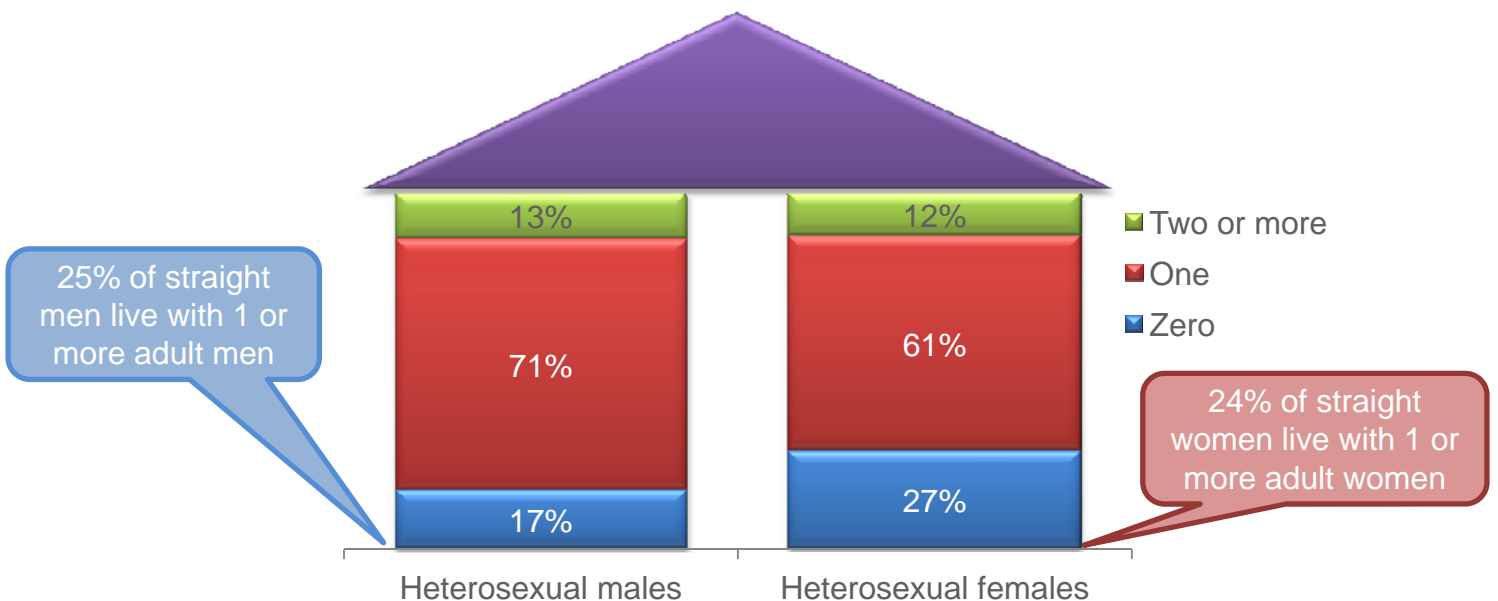
## Household arrangements and cohabitation

While marriage is a growing trend among the LGBT population, many gay and lesbian adults (as well as many heterosexuals) live with their partners without tying the knot. Today, two-thirds of lesbian women and 46% of gay men live in household with one and only one member of the same sex. As expected, the majority of married gays and lesbians are found in these household formations, but we can expect to find many cohabitating couples in this arrangement as well. Among heterosexual adults, 71% of men and 61% of women share a home with one and only one adult of the opposite sex, the comparable formation most likely to contain married and partnered straight couples.

Percent of lesbian and gay adults who live with zero, one, or two+ adults of the same sex



Percent of heterosexual adults who live with zero, one, or two+ adults of the opposite sex

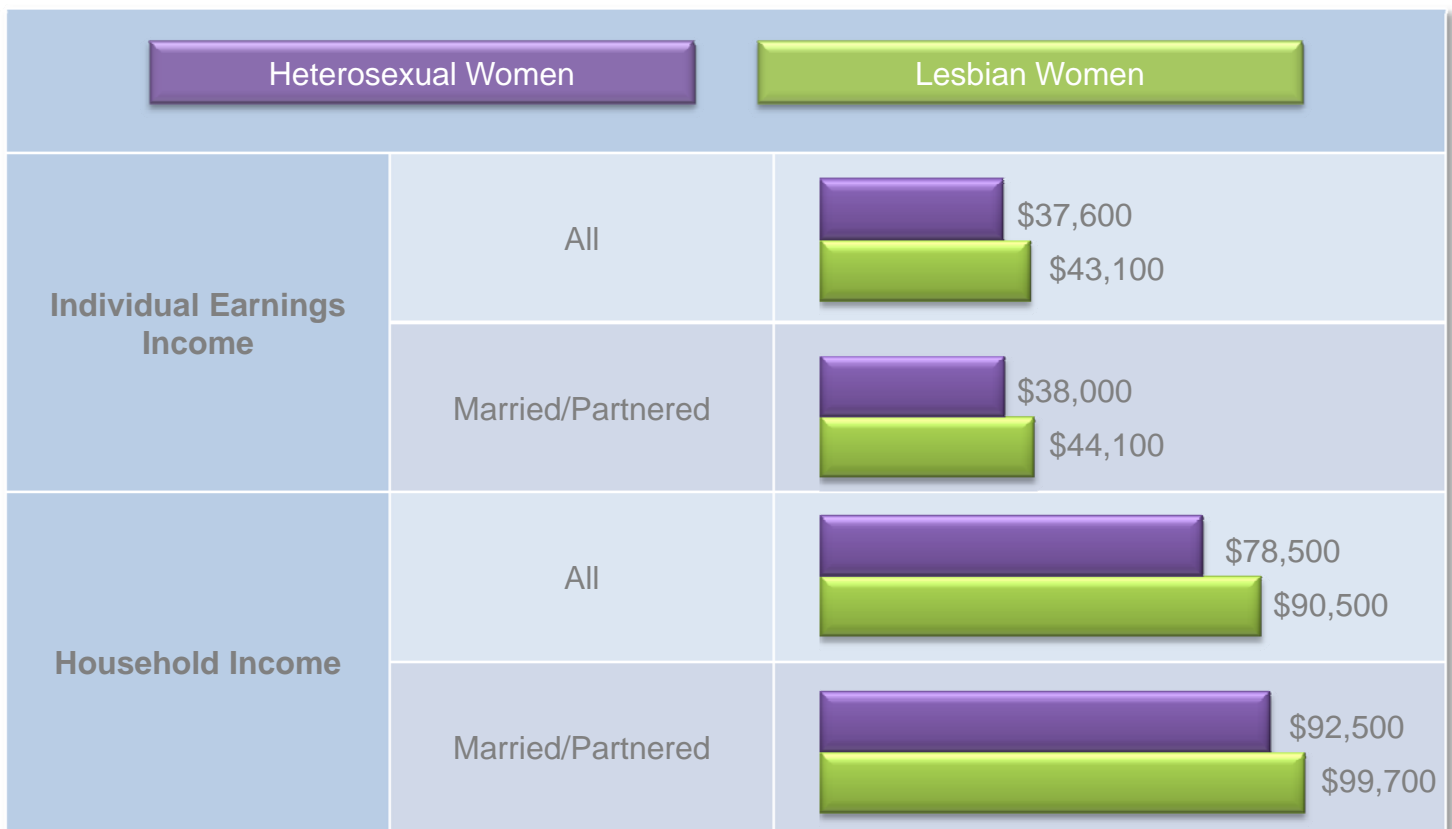


## Balancing the books

### Lesbian women earn more than heterosexual women

Regardless of relationship status, lesbian women have income levels that are higher than that of heterosexual women. Specifically, the typical adult lesbian woman earns \$43,100 a year compared with \$37,600 claimed by the average heterosexual woman. Furthermore, the typical household income of a married or partnered lesbian woman is \$7,200 higher than that of a married or partnered heterosexual woman (\$99,700 versus \$92,500).

Mean individual earnings and household income of women, by sexual orientation



“For the purpose of this analysis, “partnered” is defined as lesbian women whose household contains exactly two adult women or a heterosexual woman whose household includes exactly one adult male.

## Married or partnered gay men have the highest incomes

When it comes to individual income, gay and straight men may earn roughly the same amount, but married or partnered gay men take home nearly \$8,000 more than their straight counterparts. Furthermore, when looking at married or partnered gay men, we see that their household incomes are over \$21,000 higher, on average, than that of the typical married or partnered heterosexual man. The average household income of a partnered gay man is \$116,000 versus \$94,500 for a straight partnered man.

### Mean individual earnings and household income of men, by sexual orientation



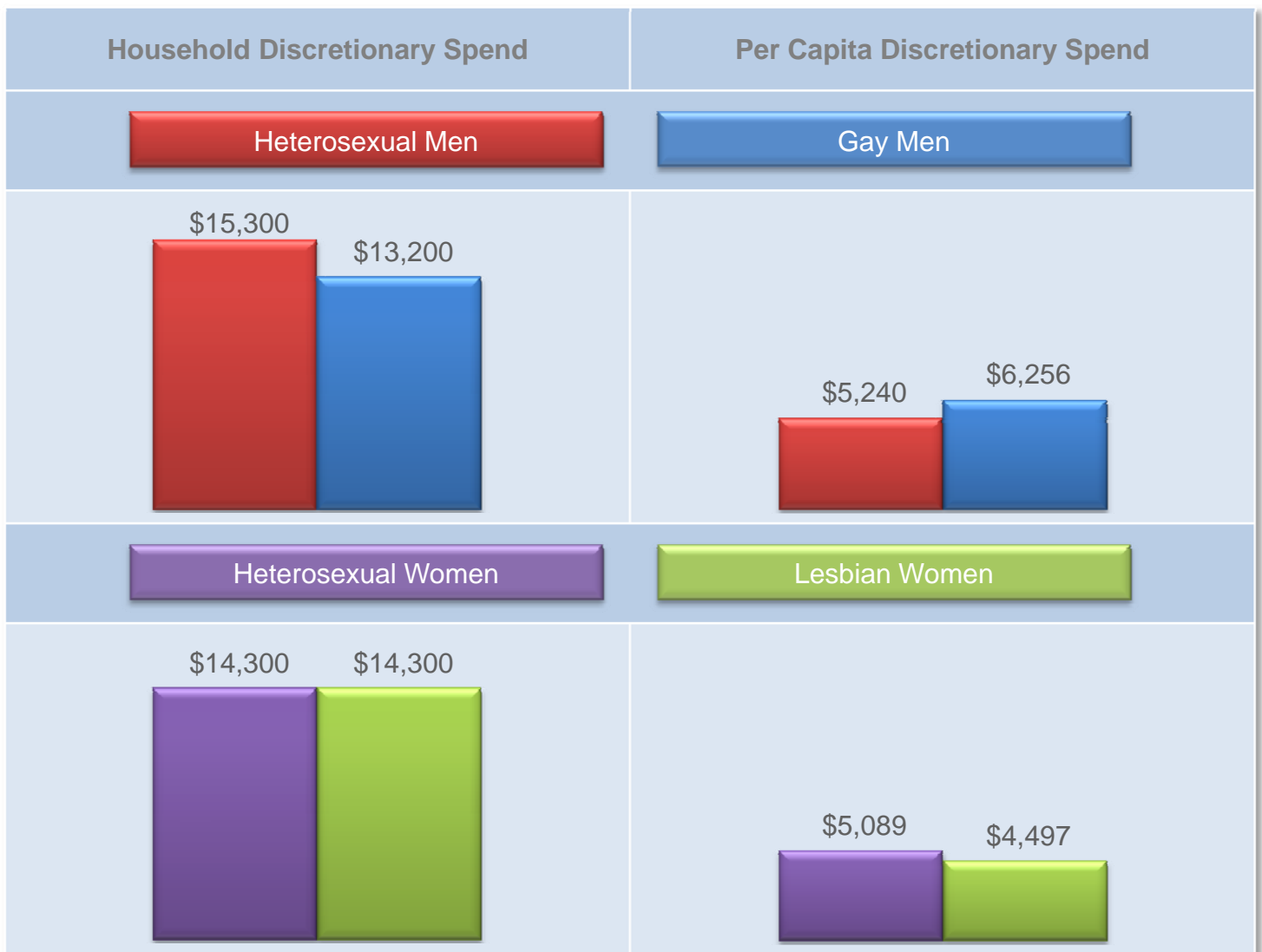
For the purpose of this analysis, “partnered” is defined as gay man whose household contains exactly two adult men or a heterosexual man whose household includes exactly one adult female.

## Partnered men earn more, but have lower discretionary spending

Income levels are important to consider when targeting consumers, but more important is determining the amount of money they have left over after the bills are paid for non-essentials. Despite having higher incomes, some may be surprised to learn that lesbian women have only the same amount as heterosexual women to spend on discretionary items. Likewise, gay men have less than heterosexual men for non-essentials, even though their incomes overall are quite equal. This is mostly likely due to the fact that both lesbian and gay adults tend to reside in larger cities where the cost of living can be considerably higher.

Interestingly though, when household size is brought into the equation, we see that gay males actually have more to spend on non-essentials per capita than straight men. Gay men, for instance, live in households that spend \$6,256 per capita on discretionary spending, nearly \$1,000 more than what the households of heterosexual men spend.

Mean annual household spending on discretionary purchases, by gender and sexual orientation



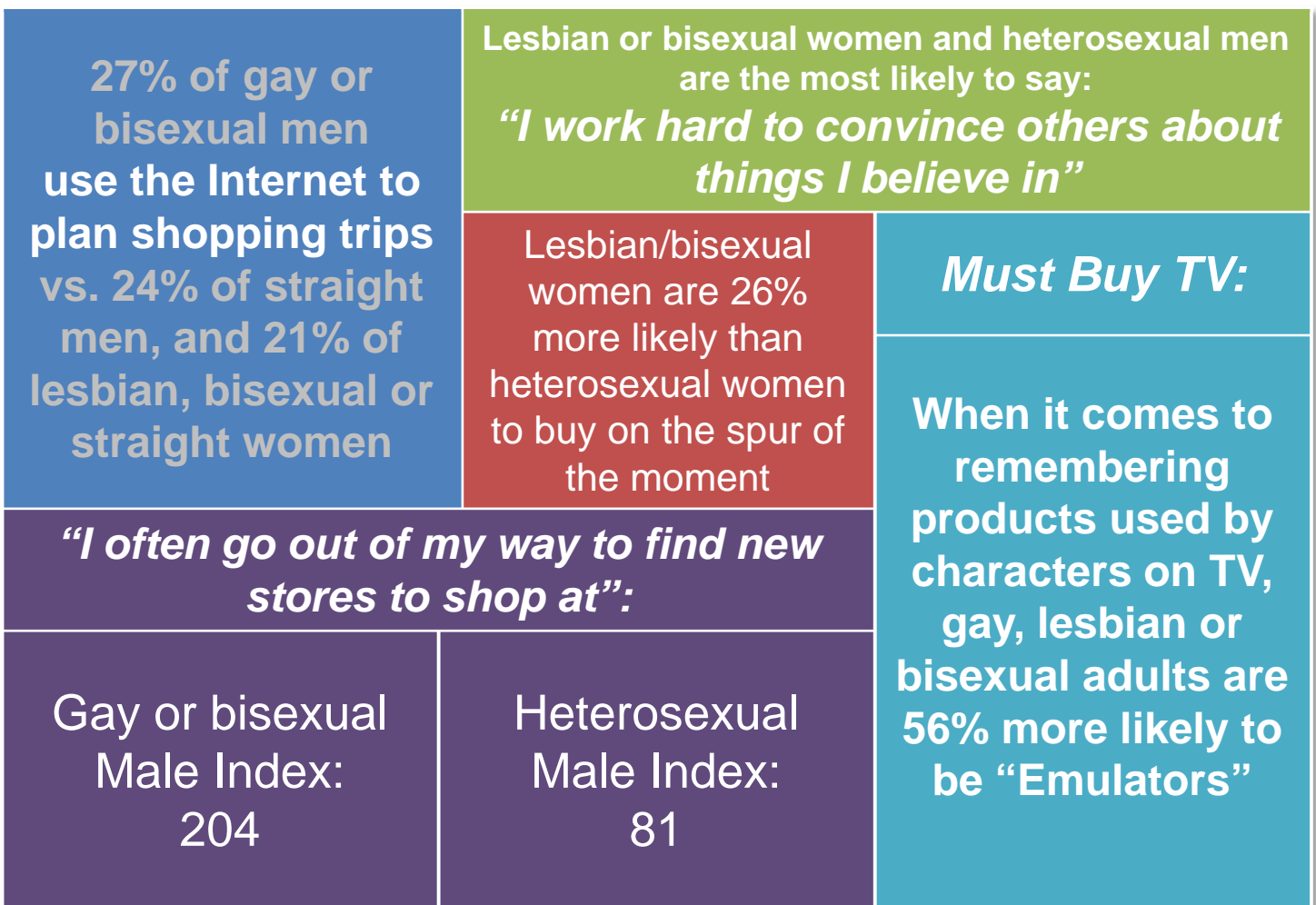


## Shopping around

### Lesbian and gay shoppers are influential trendsetters

For lesbian, gay and bisexual consumers, shopping is a social activity. In fact, gay or bisexual men are 65% more likely than heterosexual men to say, “I prefer to shop with my friends. Lesbian or bisexual women are 45% more likely than straight women to agree with that statement. Not only that, but gay and bisexual men say they’re willing to go out of their way to find new stores, a task that will likely involve a bit of online research. Meantime, 40% of lesbian or bisexual women say that they buy on the spur of the moment versus 32% of heterosexual women.

Reaching these consumers through traditional advertising channels can be a tricky task, since many say that they generally dislike advertising or find it annoying. However, one way that may be effective at reaching this influential segment is through product placement. We find that lesbian, gay and bisexual consumers are more likely to remember such products and want to buy them the next time they go shopping.



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