



## Market Research

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Social scientists, demographers, and epidemiologists face significant challenges when they attempt not merely to count glbtq Americans, but also to examine their lives, sexual behavior, and intimate relationships, as well as their households and family structures. Over the past decade, market researchers and political pollsters have also been equally determined to understand the consumer and voting behaviors of gay men and lesbians.

### **The Persistent Hurdles of Gay Market Research**

Stigma, fear of family and social rejection, the loss of employment, legal discrimination, many shades of bigotry, and threats of violence have long made it difficult for sexual minorities truthfully to disclose their identities not only to others but even to themselves. The enduring shadows of the "closet" and confusion about the nature of sexual orientation have confounded many experts from long before the 1940s when Dr. Alfred Kinsey began his work until today.

These factors highlight this fundamental question: How can we identify, enumerate, and query individuals who often choose not to be recognized, let alone be counted and truthfully observed? Marketers share one basic conundrum: while they are determined to connect with all their customers, including gay men and lesbians, they often must struggle to find them, even those in their own midst.

Remarkably, and despite persistent obstacles, today there is a growing body of new research data that reflects the increasing visibility of gay men and lesbians. This research is helping to replace myths with reality by offering a more complete snapshot of a highly diverse population of gay and lesbian consumers. Though still evolving, newer scientific methodologies enable us now to query gay men and lesbians with a higher degree of safety and anonymity, which leads to growing confidence in the research conclusions.

### **Beginning with Dr. Kinsey**

Starting in the mid-twentieth century, with Dr. Alfred Kinsey, whose estimate that ten percent of the males in his data were more or less exclusively homosexual for at least three years between the ages of 16 and 55 as a benchmark, many researchers have attempted to perform their own counts using a wide range of useful, albeit flawed, tools--ranging from the General Social Survey (GSS), a national survey of adults conducted every two years, through far less scientific intercepts at community events such as gay pride festivals, gay magazine readership analyses, and postcard surveys. Most recently, we have benefited from the much-improved 2000 U.S. Census measure of same-sex households, as well as conventional telephone polls, voter exit polls, and online surveys.

Regrettably, early market researchers too often distorted and hyped the glbtq population by over-emphasizing the highly visible gay white urban male. This segment of the community was the most "out" and, therefore, comprised a larger portion of magazine subscription lists. They were also the likeliest attendees at gay community events. This skewed research also too often relied on unbalanced samples

taken primarily from gay magazine readership surveys.

It really is not surprising that some marketers and investigators ballyhooed the affluence and mystique of the gay male consumer. Although they may have been on target, they only provided data about a narrow slice of the entire glbtq population, a segment that was more readily detectable and open in market behaviors.

These distortions led to unwarranted public policy side-effects by exaggerating gay male wealth and incomes and suggesting that economic, social, and political discrimination against gay men and lesbians is either non-existent or overstated. Understanding of gay men and lesbians was frozen in stereotype, which discouraged greater attempts at statistical accuracy.

Fortunately, through advanced survey techniques and through peer-reviewed examination by leading social scientists, such as Dr. Edward O. Laumann at the University of Chicago, Dr. Lee Badgett at the Institute of Gay and Lesbian Strategic Studies, Dr. Caitlin Ryan at San Francisco State University, Dr. Gary Gates at the Urban Institute, Dr. Katherine Sender at the University of Pennsylvania, Dr. Ken Sherrill at Hunter College, and Dr. Gregory Herek at the University of California (Davis), among others, we are now achieving a richer, more complex, and certainly more accurate picture of gay men, lesbians, and bisexuals through re-examined and newly emerging survey data.

Marketers and political scientists benefit significantly from these academic perspectives, which foster similar investigations about gay and lesbian households by, for example, tracking attitudes in the workplace and in commerce. Such research helps us understand how glbtq populations are similar to and different from non-gay populations.

### **Sexual Orientation from Many Dimensions**

When we speak about sexual orientation, and refer to gay men, lesbians, bisexuals, and transgender individuals, what do market researchers mean?

In their pathbreaking 1994 work, *The Social Organization of Sexuality*, Dr. Edward Laumann and his colleagues establish the case for defining homosexuality along three distinct dimensions: identity (how individuals self-label their sexual orientation), same-sex desire, and same-sex behavior.

Many other studies, especially those conducted by professionals in the field of public health and social science, narrowly defined homosexuality in terms of whether an individual engages in same-sex sexual behavior. However, for the purpose of establishing the parameters of the gay and lesbian population in toto, this approach may be inappropriately narrow because it does not take into account the other aspects of sexual orientation that Laumann attempted to capture.

There are at least two other ways to define a sexual orientation that is other than heterosexual apart from same-sex intimate behavior. One is sexual and emotional attraction to members of the same sex, and the other is self-identification to oneself and to others as lesbian, gay, or bisexual. Defining sexual orientation exclusively in terms of behavior does not take into account the fact that individuals may self-identify as gay or lesbian and not be sexually active. Neither does it acknowledge the fact that some individuals engage in same-sex sexual behavior but do not self-identify as gay or lesbian.

In their attempt to capture a national sample, Laumann and his colleagues posed essential questions about same-sex behaviors, partners, identity, appeal, and attraction. Survey subjects were given face-to-face interviews, conducted privately and in confidence; however, for a majority of the subjects, the questions about sexual behavior, desire, and identity were submitted in writing and asked in a self-administered questionnaire only at the very end of the interview. The interviewers, for the most part, never saw the answers because the private questionnaire was placed in an envelope and sealed by the respondent before

being handed back.

In terms of same-sex behavior, this study determined that slightly more than 4% of women sampled, and nearly 9% of men sampled, reported that, since puberty, they had had sexual activity of some kind with same-gender partners. For market researchers, of course, more relevant than gauging and investigating sexual behavior is the question of sexual identity and self-awareness. If you wish to speak persuasively to a gay consumer, very often the single most important question to ask is whether the individual self-identifies as gay and what media and market channels are most influential with this individual.

### **The Enigmatic Nature of Sexual Orientation**

Another important dimension of sexual orientation is the fact that, unlike visible racial characteristics or ethnic traits, sexual orientation is not an attribute that can be tracked or detected at birth or at an early age. Moreover, for some individuals, sexual orientation does not appear to be entirely fixed but instead may be a more evolutionary characteristic that challenges our deepest understanding of the roles played by genetics and the environment. Sexual maturity and awareness awakens at different times for different individuals.

Another challenge with tracking individuals based on their sexual orientation has to do with the nature of sexuality itself. Is being gay or lesbian simply being attracted to a member of the same sex? Or is does it require individuals to actually have sexual relations with members of their own sex? Does it include people who only sometimes have sex with members of their own sex?

Laumann's research indicates that the proportion of individuals--whether male or female--who express same-sex attraction or participate in same-sex behaviors is greater than the proportion who are willing to self-identify as gay, lesbian, or bisexual.

Research also shows that self-description--i.e., identifying openly as gay, lesbian, or bisexual-- remains a very complex process influenced by innate and environmental aspects. For some, particularly males, the process of identifying as gay, or "coming out," appears to occur now at younger ages than it did in the past, while for other men and women, the process may not unfold until mid-life, if at all.

These observations ought to be qualified in light of the fact that our culture is shifting in a number of seismic ways. In the future, with increased visibility of glbtq individuals and characteristics, the attitudes of children and adults toward homosexuality may well change and that may lead to a greater willingness to self-identify as gay, lesbian, or bisexual. There is some anecdotal evidence that this shift may already be underway, with adolescent girls and boys identifying as bisexual and lesbian or gay and choosing to attend high school proms as lesbian or gay couples.

Socialization, family and community expectations, and cultural norms, of course, play key roles in the comfort-level and acceptance that any person feels about his or her sexual orientation. Perhaps not surprisingly, most recent sampling of gay men and lesbians tends to be skewed towards younger, emboldened individuals (for example, between the ages of 18 and 49, contrasted with fewer proportionately who are 50 years of age and older). Online samples also suggest a wide range of self-knowledge about bisexuality, with a broad range of behaviors and attractions among men and women who self-identify with this label.

### **Gender Identity vis-à-vis Sexual Orientation**

Arguably the least understood and hardest to find segment within the glbtq population is that of transgender individuals. Unlike sexual orientation, gender identity does not specifically focus on same- or opposite-sex attraction or behavior.

A transgender individual is one whose assigned gender at birth may differ from his or her own perception as a man, woman, or intersexed person (someone with characteristics of both sexes). For accuracy's sake, researchers must take care to not confuse gender identity with sexual orientation or to oversimplify its characteristics.

### **How Many After All? The Census Begins to Include Same-Sex Couples**

Census 2000 may be recalled by the national media as the gay census for its far-reaching effort to enumerate same-sex households in the United States. Although single gay men and lesbians were left out of the count, demographers say the tally of 600,000 same-sex couples (or put another way, 1.2 million same-sex "unmarried partners") is the result of the most extensive, albeit still imperfect, polling ever conducted of gay men and lesbians in America.

Despite the remarkable findings, demographers concluded that this census significantly undercounted the true number of same-sex households--likely due to longstanding stigma and understandable fears of disclosure, among other explanations. It should be kept in mind that the methodology of the census itself also contributes to undercounting many couples, heterosexual as well as homosexual. Since the census is designed to examine households and their structures, it does not include questions of a more sensitive and personal nature; more specifically, it does not query sexual orientation. Therefore, the census may easily overlook gay and straight couples who do not live together, and couples who live together but, for many reasons, chose not to fill out the census form as a couple-headed household.

Nonetheless, in the 2000 U.S. Census, respondents were given the option of selecting "unmarried partner" when disclosing their household was headed by two adults of the same gender. In these instances, the census also ruled out all other, ordinary family relationships by blood or marriage and any mere associations through joint tenancy (such as a landlord-tenant or roommate circumstance). When other partner relationships were ruled out through a series of logical questions, these same-sex households were accurately identified as "unmarried partners" of the same sex and formally classified by demographers as gay and lesbian couples.

Perhaps not surprisingly, more than 99 percent of all U.S. counties had at least one household headed by unmarried partners of the same sex. The census report found that roughly one in three lesbian couples and one in five gay male couples were raising children under the age of 18 in 2000, which compares with 39 percent of opposite-sex unmarried partners. The comprehensive analysis of this demographic data by Urban Institute researcher Dr. Gary Gates provides us with the deepest and most valuable portrait yet of same-sex households.

### **The Myth of Affluence Redux**

Lasting stereotypes about gay affluence are hard to dispel, yet economist and academic Dr. Lee Badgett has dedicated the past few years to a closer examination of existing income and population data on gay men and lesbians. In her book, *Money, Myths, and Change*, she explores the true diversity of economic life within this population and the reality that lesbians and gay men appear to earn no more than their heterosexual counterparts. Moreover, it appears in some cases that gay men earn less than comparable heterosexual men.

The 2000 Census, however, does suggest that same-sex male partner households may earn slightly more than heterosexual couples. This distinction may be entirely based on gender differences rather than sexual orientation, given that men earn more than women, and the finding that same-sex households are more likely to have both partners employed than their counterpart heterosexual couples.

For successful marketers, the concerns about earnings and affluence are less important than gay consumer patterns, needs, and preferences. Market researchers today thus focus far more on buying attitudes, brand

loyalty, and traits such as early adopters of new products and styles. These are all attributes that are key to understanding differences between glbtq and heterosexual consumers, and they are precisely where marketers focus their attention.

### **The Anonymity of the Net**

Finding hard-to-reach populations has always strained researchers and posed costly obstacles to yielding meaningful and scientifically valid samples. Given overriding issues of privacy and stigma, gay men and lesbians have traditionally been among the most difficult if not most costly to track through conventional means such as face-to-face contacts, telephone, and mail surveys.

While some market researchers continue to poll at gay pride events or rely on other venues such as gay bars and publications, these samples--as pointed out previously--are notably problematic since they tend to include only the most open and fearless members of the glbtq population. Companies recognize that these respondents are a subset population, and almost never truly representative of all gay and lesbian households.

Likewise, conducting conventional telephone surveys have produced very small incidence of self-identified lesbians and gay men--usually no more than 1 percent of any random population sample. Telephone surveys conducted in many cultures consistently produce very low response rates, particularly when asking sensitive questions about sexual orientation or income levels, reflecting the normal anxiety any person would have to disclose extremely private and personal details to a stranger. Even with written surveys, the incidence of gay men and lesbians may reach only as high as 2 or 3 percent in any randomized sample.

In the past several years, however, online survey techniques have emerged as a promising solution because of their convenience, cost-efficiency, and privacy safeguards. Online surveys allow respondents to maintain complete anonymity so that many more gay men and lesbians feel comfortable when asked to share their experiences, concerns, and details of their lives, partners, households, and spending patterns. Consistently, the incidence of glbtq people among online survey samples appears to range from 6 to 7 percent, which suggests that today as many as 15 million American adults self-identify as lesbian, gay, bisexual, or transgender.

The application of Internet-based survey research methods within the gay and lesbian population has had a significant impact on the extent and reliability of data available about glbtq consumers. Dr. Lee Badgett, an academic critic of gay and lesbian consumer research, however, argues that earlier online studies of gay men and lesbians may have been skewed because "of the fact of owning computers (respondents) would naturally have higher incomes." The ability to get online has often meant that respondents to online surveys are "well-heeled."

The income disparity that Badgett highlighted is changing among Internet users, however, and there are proven statistical techniques to reduce obvious selection bias from online polling that are critical to confidentially surveying hard-to-reach populations such as gay men and lesbians.

One such technique is by using parallel online and telephone surveys--which pose precisely the same survey questions--and allowing researchers to use both traditional demographic weighting standards (i.e., age, gender, race, income, geography) as well as propensity weighting (i.e., weighting against behavioral or attitudinal characteristics that indicate the respondent has a higher than average propensity to be online than a person selected by random probability). Researchers believe that using this updated approach makes it increasingly possible to mirror the general population through research conducted online. Conducted properly, therefore, online representativeness in glbtq samples appears to be within reach.

Additional in-depth research suggests that online surveys are demonstrably more representative of the gay population than the outreach samples frequently used by market researchers studying the gay and lesbian

population and that are carried out in venues frequented by gay men, especially bars and clubs.

For example, one such useful study on sexual behavior was published in *AIDS Education and Prevention* in 2002 by Scott D. Rhodes et al. Although the sexual orientation of study participants was defined in terms of sexual behavior, this research has significant implications for evaluating the promise and validity of online surveys of gay men and lesbians.

The authors of this study concluded that the findings of their research did not validate the assumption that "Internet respondents are younger and more educated than traditionally recruited adult samples." The results of the study were seen to be in line with other studies suggesting that "educational, economic, and employment differences (i.e., the 'digital divide') identified within the general population with regard to Internet use may not be evident among MSM [i.e., men who have sex with men]." The most likely reason for this phenomenon is "the adoption of the Internet by MSM as a safe place to interact without fear of negative social consequences." In simple terms, gay men and lesbians are early adopters of the web and find its virtual community a safe and anonymous place to connect with and meet others.

While there are inherent biases in all forms of research, the key for future market studies will be to reduce online sample bias by 1) recruiting respondents from a very broad pool of offline and online sources, economic and social backgrounds, racial populations, and geography; 2) safeguarding against individuals attempting multiple responses; 3) achieving generous sample sizes sufficient to draw conclusions; 4) conducting parallel testing online and offline and (through propensity weighting) scientifically establish weighting techniques for all sampling; and 5) disclosing survey methodologies and margins of error to conform to industry polling standards.

## **Conclusion**

Market research today is a valid and promising tool for understanding and mapping glbtq households and will become even more important and more useful in the years ahead. Experience tells us that the rapid progress in this area made in corporate America and in the marketplace show growing respect and acceptance for gay men and lesbians as customers, managers, entrepreneurs, shareholders, and employees.

As public opinion trends underscore, American attitudes toward homosexuality and sexual minorities, particularly among younger people, are changing very quickly. This improving climate combined with enhanced knowledge will inform public debate among policymakers and help transform ignorance and invisibility into broader social acceptance for one of the world's remaining stigmatized and often misunderstood populations. It serves everyone's interest to foster and advance all forms of research about glbtq people.

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