

GLBT MARKET OVERVIEW



IGLCC

A WORLD PREMIERE



We have asked and been asked many times about the size and economic power of the LGBT community. New terminology has been created to describe it. Pink money now is understood to qualify and quantify our purchasing power.

Listening to the growing demand for information, the IGLCC has partnered with BC3 Strategies and Double Platinum to create the first ever comprehensive market research that will answer many of the intriguing questions about our community.

This partnership allows us to present a comprehensive overview of the demographic, economic and also social situation starting in our 13 member countries. From there, we will be able to expand the research and venture further into market studies in these and possibly other countries.

With this initiative, the IGLCC and its partners take the lead on international LGBT research. Starting today we won't need to guess anymore.



INTRODUCTION



This report is the outcome of an analysis of GLBT segment marketing potential in specific countries around the world. The study was commissioned by the International Gay and Lesbian Chamber of Commerce and conducted by Double Platinum/BC3 Strategies, a global GLBT marketing and strategy firm with offices in Toronto, New York and Barcelona.

The findings are based on data collected from publicly accessible information sources, including web sites, government statistics offices and the public CIA Global Information Service.

This report is intended as a thin-slice overview of the segments, and is not presented as a definitive market analysis. The statistics used are intended as estimates and should be used as general guides rather for predictive purposes.

It should be noted that all amounts are expressed in Euros.



AUSTRALIA



Hospitable political climate

Australia has a reasonably hospitable political environment for GLBT people, though its strength is its society and culture which doesn't necessarily reflect its political environment. However with recent changes in its government it is suspected that there will also be favourable changes to GLBT legislation.

Anti-discrimination laws in place in all states and territories, but not in Commonwealth legislation.

No laws against homosexuality. However Queensland's, age of consent for anal sex is set at 18, 16 for all non-anal sex, regardless of any participants, since 1990.

Same-sex unions: Registered partnerships: The cities of Melbourne and Sydney; The states of Tasmania and Victoria; Unregistered co-habitation: Australian Capital Territory, Northern Territory, Norfolk Island, Queensland, Western Australia, South Australia and New South Wales.

Same-sex marriage is banned under Commonwealth law since August 2004.

Same-sex adoption: Allowed in Tasmania (biological child), Australian Capital Territory, Victoria and Western Australia only; Other states/territories ban this.

Economy

The Australian economy was strengthened by its former government which makes Australia more open and desirable to international businesses that have progressive attitudes towards the GLBT workforce.

Cultural acceptance

There is a great cultural acceptance and GLBT community infrastructure that is a result partially of the character of the Australian people but also due to the numerous GLBT advocacy groups and NGOs. There is a high level of acceptance in large cities as GLBT population clusters in Sydney, Melbourne, Adelaide, and Brisbane.

Development value

Australia should be considered a Tier-2 development market, though its location is detrimental for international business.

Economic assessment

GLBT business environment is well pronounced and thriving in the major cities like Melbourne and Sydney; however, it is vacant outside of these hubs.

Australia's hosting of many prime GLBT events brings many customers to the Australian market.

Sporting events like the 1st Asia-Pacific OutGames and the World Gay Games contribute heavily to the local economy.

Summer events and festivals like Pride, Sydney's Mardi Gras and the Midsummer Carnival build this market.

The main attraction is tourism and this is the central industry that jogs the GLBT economy.

There is a great business networking infrastructure in place for the major cities of Sydney and Melbourne.

These professional organizations are centrally linked through GLOBE and hold events like "Fruits in Suits" and "Lemons With a Twist".

The Australian market does not appear to be well connected to multinational business as there were few signs of sponsorship and GLBT marketing by large companies on their web pages.

It seems as if Australia is just catching the proverbial GLBT wave in business and has a ways to go before they can be on par with North American and even Europe.

IBM is sponsoring the Asian Pacific OutGames this year, which provides a significant boost in corporate credibility.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 20 434 176 | 1 226 051 | 33 381 | 40 926 808 431 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Good | 72.9% | Fair | - | Fair | Medium |

AUSTRIA



Political climate

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Unregistered cohabitation since 2003. March 2008 a registered partnership bill will be introduced.

No same-sex adoption.

Cultural climate

Austria is largely considered a conservative country though its proximity to the larger European economy of Germany, with which it shares language and history. This proximity in geography and attitude make Austria a logical next step in the development of a growing European GLBT market.

Tourism to Vienna is quite popular and it as a city has a relatively large and vibrant GLBT community.

Market development

Austria should be considered a Tier-2 development market.

Economic assessment

Austria is a thriving marketplace for GLBT business.

It benefits from its connections via a common language with Germany and shares GLBT business network connections with its larger neighbour.

A scan of the AG PRO GLBT business directory reveals a variety of national companies that have embraced GLBT individuals as part of their corporate culture.

Further, gaynet.at has extensive listings of national and local Austrian GLBT businesses that range in services from gay wedding planning, GLBT driving schools, gay friendly multimedia design and flower shops. Essentially every sector of the Austrian business field has become open in one way or another to GLBT business and individuals.

Total Population

8 199 783

Est. G/L Pop (6%)

491 987

Est. G/L Individual Inc (€)

34 717

Est. G/L Spending Power* (€)

17 080 312 679

G/L Media Outlets

Moderate

Internet Penetration (GM)

56.7%

G/L NGOs

Moderate

GLBT Identity rating

-

Political climate

Moderate

Marketplace readiness rating

Medium

BRAZIL



Political climate

Constitutional protection for sexual orientation in some states of Brazil.

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Civil unions in Rio Grande do Sul.

Same-sex adoption is allowed.

Brazil is a growing tiger of the Global South with an immense workforce that --given the opportunity for employment--is making the country an economic powerhouse. Key socio-economic issues--unemployment, poverty and crime--restrain Brazil from leadership in the world market. Recognizing this, IBM has invested in significant GLBT workplace programs in Brazil.

Cultural acceptance

GLBT individuals enjoy a level of acceptance in Brazil's urban centers that contrast sharply with the relative lack of development in the Global South. An animated activist culture has even spawned national gay rights conferences with major stakeholders and government officials attending. The Rio de Janeiro and Sao Paulo gay pride parade/festivities are the largest in the world with several million people attending.

Market development

Brazil should be considered a Tier-3 opportunity due to its large population, tourism industry, and openness to structural adjustment, and foreign business.

Economic assessment

Widely recognized as the prime mover of the global south, Brazil also has unrealized potential in the GLBT tourism industry which is the staple of its GLBT business.

ABRAT GLS, a major GLBT business association, focuses on the GLBT tourism industry.

GLBT hotels, tours and travel agencies and the largest GLBT pride festival in the world, combined with long beaches and vibrant nightlife, make Brazil a prime destination.

While the predominant GLBT industry is tourism there is also a market for beachwear and erotic apparel.

The nation's large population alludes to a great potential for GLBT business expansion; however the nation is restrained by social problems, poverty and crime.

WTO structural adjustment programs have also led to economic turmoil for many Brazilians.

There is limited international GLBT marketing apparent online on Brazilian websites which points to both its potential as a site for multinational growth but also the inherent volatility of such expansion; IBM is the exception. However, national GLBT industries and businesses feature prominently and are quite successful.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 190 010 647 | 11 400 639 | 8 635 | 98 444 517 765 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Moderate | 22.4% | Moderate | - | Fair | Low |

CANADA



Political climate

Welcoming to diverse peoples of all types.
Constitutional non-discrimination since 1991.
Same sex marriage since 2005.

Elected GLBT officials in more populated provinces.

Cultural acceptance and community infrastructure.

High level of acceptance in large cities as GLBT population clusters in Toronto, Montreal, Vancouver, Ottawa, Calgary and other cities.

Gay tourism campaigns for Toronto, Montreal, Nova Scotia, Vancouver.

NGOs serving community include community centers, health organizations, business groups (Canadian Gay and Lesbian Chamber of Commerce), film and theater festivals, sports events (OutGames, Calgary Gay Rodeo).

GLBT media includes print, television, internet and OOH clustered in cities.

Business environment affected by US trends toward diversity and inclusion.

Economic assessment

While the majority of the GLBT community is situated in urban centers, which drives a large GLBT business community, the internet penetration spawns a lively GLBT market outside of the major hubs.

There is a great deal of multinational support for GLBT diversity in Canada from companies such as IBM, XEROX and Delta Hotels along with strong support from major national banks like Toronto Dominion, ING and Desjardins as well as service industries like Air Canada and VIA Rail.

Canadian society enables the smallest of GLBT or GLBT- friendly business to thrive in major Canadian urban centers.

Canada is also known for its GLBT tourism, which supports local economies and brings in great revenues for arts and culture, along with GLBT events like the Toronto Gay Pride Week and the Toronto and Vancouver GLBT film festivals.

Market development

There are multiple tiers of GLBT business networks in Canada.

These include the IGLCC and the "Chambre de commerce gaie du Quebec" situated in Montreal, the CGLCC and Ontario GLCC both located in Toronto, as well as the LAMBDA Business and Professional Association of Manitoba.

There is certainly room to expand networks and open up new ones in other major Canadian cities like Calgary and Vancouver.

The GLBT business directories for Canada demonstrate the volume of business and openness of the society towards the GLBT market.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 33 400 000 | 2 004 000 | 34 004 | 68 144 016 000 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|-----------|----------------------|-------------------|------------------------------|
| Good | 65.9% | Excellent | Medium | Excellent | High |

DENMARK



Political climate

Denmark is a European leader in GLBT rights and legislation and is very open to the GLBT community.

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Registered partnership.

No same-sex adoption.

First country to legally recognise same-sex partnerships of any kind in 1989.

Cultural climate

While tourism is marginal, the Danish people have been historically culturally inclusive and have begun to shift towards conservatism in larger government policy. This however does not affect the potential for GLBT growth and business development in human capital campaigns especially in that nations technology sector.

Market development

Denmark's geographic proximity to Germany, the Netherlands and the UK make it a good candidate for market development. It should be a Tier-2 development market.

Economic assessment

While Denmark has progressive GLBT values they have not fully embraced the potential that can come from GLBT business.

There is a professional group in Copenhagen named "Copenhagen Gay Life" but it is not as expansive as many other similar organizations around the world.

There are few overt multinational business investments in the GLBT market. Nor is there much advertising that targets to GLBT individuals.

Denmark would benefit from an expansion of GLBT business and openness to diversity capital campaigns especially in light of the upcoming World OutGames in 2009 to be held in Copenhagen.

Total Population

5 468 120

Est. G/L Pop (6%)

328 087

Est. G/L Individual Inc (€)

33 292

Est. G/L Spending Power* (€)

10 922 672 404

G/L Media Outlets

Moderate

Internet Penetration (GM)

68.8%

G/L NGOs

Fair

GLBT Identity rating

-

Political climate

Fair

Marketplace readiness rating

Medium

FRANCE



Political climate

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Pacte civil de solidarite - «civil pact of solidarity» which is a type of civil union is a common choice with both homosexual and heterosexual couples.

No same-sex adoption.

France's economy is large and is currently undergoing reforms that will make it a much more open and successful market. France is changing and is becoming more competitive on the world market.

Cultural climate

France has an attitude of "nonchalance" about most all types of sex, including homosexuality. The mayor of Paris is gay and has a partner. But this does not mean that homophobia has been eliminated. GLBT people are not generally out in the workplaces because a general attitude of conformity is still in play.

Business climate

France has historically been a friendly destination for gay and lesbian visitors, and Paris and the southern coast have long been popular travel destinations. Both Paris and Marseilles also have annual Gay pride celebrations. But there have never been an GLBT tourism campaign to attract visitors.

Market development

France should be considered a Tier-2 development market.

Economic assessment

France has one major GLBT business network: "Autre Cercle" which serves to benefit GLBT businesses in France.

With France's strong civil sphere there has also been the rise of other GLBT professional groups such as:

A COMPETENCE EGALE (Association de Cabinets de Recrutement pour la promotion de la Diversité)

VIGEO (Agence de Notation sociale)

SNEG - Syndicat National des Entreprises Gaies

There have been recent moves by the French government to develop France's economy, one of these strategic actions has been the French national equality project "DELEDIOS" which is sponsored by IBM. It aims to bring diversity to the market which is advantageous for GLBT business and individuals.

This means that France is poised to grow as an GLBT business opportunity taking aim at the benchmarks set by their continental competition in Germany and the United Kingdom.

Currently France is in a development phase and GLBT business is not as prominent as in other countries; however, tourism in both the urban centers and the south give France the potential to be a hub of GLBT business.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 61 167 000 | 3 670 060 | 30 088 | 110 423 561 760 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Fair | 54.7% | Fair | - | Fair | Medium |

GERMANY



Political climate

Constitutional protection for sexual orientation in some states of Germany.

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Registered partnership.

No same-sex adoption.

Cultural climate:

Germany's history has discouraged segmentation and discussion of diversity. But it is one of the top economies in Europe and through the efforts of leading multinational corporations, like IBM, it is becoming one of the most open to GLBT diversity. Gender discrimination is still a very large issue, which has tended to overshadow GLBT issues at times.

Economic environment

Its large manufacturing and technology sectors are successfully expanding through GLBT corporate visibility and diversity recruitment. With corporations like IBM, KPMG and other supporting diversity, GLBT individuals are finding successful corporate employment. Tourism to Germany is somewhat popular though it rises with its large festivals like Love Parade and Oktoberfest. GLBT visitors are welcomed in Germany's large cities and they find vibrant GLBT communities, clubs, and events. Including the upcoming 2010 World Gay Games in Cologne.

Market development

Germany should be considered a Tier-1 development market.

Economic assessment

Two prominent German GLBT business networks: Volklinger Kreis E.V. and Wirtschaftsweibern (lesbian section).

These groups are among the largest in the world and offer connections internationally, within Europe (in particular to other German speaking nations like Austria and Switzerland), as well as municipal networks in many German cities.

Volklinger Kreis has IBM corporate sponsorship and is working with Unicef and SchLau NRW, which is a demonstration of its clout in the market. VK holds seminars, acts as professional lobbyist group, offers best practise examples such as Hoechst AG and Dresdner Bank.

Germany is an GLBT powerhouse and can serve as an example to other nations on ways to develop diversity capital.

Leading German companies like IBM, BASF, and Deutsche Bank AG are realizing the potential of the GLBT market to improve profits and integrate skilled GLBT workers into their companies.

The German free market supports the development of any economic sector. Therefore GLBT business is encouraged though not explicitly differentiated in public due to the general conservative nature of the society.

German GLBT business opportunities exceed travel, tourism and leisure and extend into the fields of banking, industry and technology.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 82 4000 996 | 4 944 060 | 30 622 | 151 397 005 320 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|-----------|----------------------|-------------------|------------------------------|
| Excellent | 64.6% | Excellent | - | Fair | high |

MEXICO



Political climate

Mexican Congress reformed the Constitution in 2001, to forbid discrimination of any kind; in 2003, this change produced the Federal Law to Prevent Discrimination that forbids discrimination by sexual orientation. Civil unions (Mexico City and Coahuila).

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Civil unions in Mexico City and Coahuila.

No same-sex adoption.

Cultural acceptance

Mexico has a small, subdued provincial GLBT community; gay residents don't make a large mark on the social life of their community. Conversely, it has a vibrant and expansive urban GLBT community in Mexico City and the district of Coahuila. Growing GLBT public consciousness has led to freer expression and public recognition; albeit there is still some discrimination.

Economic climate

Mexicans in general are restrained economically, and many GLBT do not benefit from the somewhat better economic livelihood that occurs in Europe, North America and Oceania. The small, gentrified class of GLBT in Mexico City constitutes a large number.

Market development

Mexico is a Tier-3 development market due to its population and tourism potential from gay hubs in the USA, Canada, and for European GLBT tired of the Mediterranean. Its lack of a major GLBT economy outside of tourism is detrimental to growth.

Economic assessment

Mexican GLBT business also appears to be exclusively local and there isn't a major presence of international businesses.

GLBT travel and tourism in Mexico is prominent business venture.

Touring companies like "Enkidu" and "Mexico From Behind" thrive.

Property and real-estate development for GLBT individuals is also well developed.

The nightclub and bar scene are also popular GLBT economic drivers.

GLBT tourism however is mostly located to Mexico City, Puerto Vallarta, and the Playa del Carmen which are separate from the main tourist hub of Cancun.

Lacking a website for the Cámara de Comercio Gay de Mexico, Mexico does not have a centralized GLBT online presence for Mexican GLBT business.

Very limited GLBT marketing .

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 108 700 891 | 6 522 054 | 11 127 | 72 570 894 858 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Moderate | 21.3% | Moderate | - | Fair | Low |

NEW ZEALAND



Political climate

New Zealand has had a rocky GLBT history. It was once a hub of discrimination and homophobia but has progressed considerably with anti-discrimination laws and an evolving more educated society.

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Civil unions.

Same-sex adoption is allowed.

Cultural acceptance

While not a world diversity Mecca, New Zealand along with its growing social consciousness is moving towards a growing diversified workforce that is able to meet the challenges of the new century.

A beautiful country with a wonderful climate makes New Zealand an ideal vacation spot for GLBT tourists. The HERO Festival and Parade in Auckland are also large tourist attractions.

Market development

New Zealand should be considered a Tier-2 development market.

Economic assessment

New Zealand has a small but growing GLBT business network.

Spearheaded by the Gay Auckland Business Association.

GABA's website includes a business directory that requires a password.

GABA holds events and networking celebrations as well as a charitable trust auction.

The New Zealand GLBT market can boom with a successful lobby for full gay marriage rights.

New Zealand's chief GLBT industry is tourism with a close second being arts and culture; is there a benefit to marketing New Zealand and Australia together?

There is limited multinational corporate support of the GLBT market in New Zealand with the only prominent sponsor being IBM.

There is however a large and expansive national network of businesses that support the GLBT economy in New Zealand which range across all sectors.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 4 115 771 | 246 946 | 24 302 | 6 001 281 692 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Moderate | 74.9% | Fair | - | Fair | Medium |

QUEBEC



Political climate

Benefits from the open attitude of the Canadian government.

Cultural climate

Urban Quebec is a totally accepting environment for GLBT individuals with a vibrant community in Montreal and Quebec City, clearly the Canadian leaders in terms of nightlife, culture, the arts, festivals and sports.

Quebec is also the headquarters of a number of influential advocacy groups such as student associations, health promotion and advocacy, political lobbying and human rights groups. A plethora of other more specifically oriented groups for gay Asians, gay Jews, and gay youth to name a few.

Economic assessment

According to the DP/BC3 economic model, GLBT Quebecois fall significantly below the Canadian national average of €4,004 for individual income at €1,270. In the absence of equivalent data for urban Quebec, our model used the Montreal StatsCan income numbers as a base. However, we believe that these income estimates may be understated, given the complex distribution of incomes in Quebec.

Quebec has its own GLBT chamber of commerce which holds galas, networking events between chambers of commerce, as well as arts and cultural events.

There is a great amount of multinational and national business in Quebec that values diversity from global companies like IBM, IKEA, and Xerox to national companies like VIA Rail, Desjardins bank, TD Bank, and Labatt's.

Quebec has been expanding into the biotechnology and research sectors and is showing great promise to become a driving force in the Canadian economy because of this endeavor. The development of a creative and knowledge based economy means that highly educated GLBT individuals will be attracted to the region.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) | G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|------------------|-------------------|-----------------------------|------------------------------|-------------------|---------------------------|-----------|----------------------|-------------------|------------------------------|
| 7 546 131 | 452 767 | 28 904* | 8 809 940 286 | Good | 65.8% (2006) | Excellent | - | Excellent | High |

SPAIN



Political climate

Spain is widely considered to be a world leader in GLBT rights and advocacy. It has the necessary political background, public appeal and environment for GLBT market expansion. While on the forefront of GLBT rights and advocacy, the Spanish trail in corporate diversity and GLBT advertising in comparison to the UK and Germany.

No laws against homosexuality.

Anti-discrimination laws in place.

Same-sex unions: Same-sex marriage. June of 2005 the Spanish government approved full marriage rights for homosexual couples, becoming only the third country in the world to offer that status.

Same-sex adoption is allowed.

Unregistered and Registered Cohabitation in a number of regions.

GLBT in government: Pedro Zero, openly gay Madrid city council member and former president of FELGT, is a member of the ruling Socialist party's executive committee.

Cultural climate

As the second-most Catholic country in Europe, there is extensive resistance to GLBT equality, which has an impact on GLBT workplace diversity. In 2007, EuroPride was held in Madrid and attracted nearly 3 million participants.

Economic environment

Without campaigns focusing on GLBT travelers, Barcelona has become one of the favorite

GLBT destinations; it is also the home of Xarxagay, the Catalanian GLBT business association and IGLCC member association.

Market development

Spain should be considered a Tier-2 development market. Spain can grow and expand economically through leveraging its diversity to its economic benefit.

Economic assessment

Spain is a second tier hub of GLBT business. This likely is a reflection of its broader national economic standing versus European powerhouses of the UK and Germany.

Spain is well integrated in international GLBT business environment hosting an IGLCC conference in 2007.

There is a fantastic potential for growth in Spain because of its legislative inclusion of GLBT individuals and their integration into society.

Major international brands like Nissan and IBM have realized potential of GLBT marketing in Spain.

Spain's major GLBT tourist hubs are the Costa del Sol, Sitges, Barcelona and Madrid which have exploded with business since the Spanish government passed the 2005 gay marriage bill.

This bill was a catalyst for huge developments in the GLBT business market from tourism, bars, clubs and real estate development. Of course it also sparked a gay wedding industry.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 40 448 191 | 2 426 892 | 29 999 | 72 804 333 108 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Fair | 56.5% | Fair | - | Excellent | Medium |

SWITZERLAND



Political climate

Constitutional protection for sexual orientation in Switzerland since 2000 based on «way of life» : «Our constitution only gives protection to the family and marriage between two heterosexual people. All other lifestyles, including a homosexual way of life, is guaranteed through personal responsibility and must not be regulated by the state,» Federal Democratic Union parliamentarian Christian Waber told swissinfo. But Waber also maintains that the legislation is a «cultural break» with Christian values and threatens the institution of marriage.

No laws against homosexuality.

No anti-discrimination laws in place.

Same-sex unions: Registered partnership.

No same-sex adoption.

Cultural acceptance

Switzerland is a governmentally conservative and financially based nation that is somewhat religiously restrained yet tolerant.

Winter and ski tourism is popular in Switzerland with major cities like Zurich being the seed of GLBT life and culture. Though the city of Herzogenbuchsee is considered by some to be the country's gay capital.

Market development

It would be considered a Tier-2 development market due to the financial resources sector and inherent openness of the Swiss market which make Switzerland an apt place for development.

Economic assessment

The Swiss GLBT business market benefits greatly from that nation's geographic location and the multiple languages spoken by its people.

Swiss GLBT business networks are connected and linked up with German networks Wirtschafts Weiber and Volkinger Kreis along with the broader European EGMA (European Gay and Lesbian Managers Association).

The internal Swiss GLBT business network Wybernet is open to lesbians and holds cocktail receptions, has protected member directories and online job databases.

There is limited online expressions of multinational corporate investments in the Swiss GLBT market and few if any examples of national business support, other than IBM which supports both EGMA, VK and Prout@work.

There is only an adequate online representation of the Swiss GLBT market. This is perhaps due to the nature of Swiss society and the character of the nation.

GLBT business may exist; however it is transparent and not well marketed.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 7 554 661 | 453 280 | 35 429 | 16 059 257 120 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|----------|----------------------|-------------------|------------------------------|
| Moderate | 69.2% | Moderate | - | Fair | medium |

UNITED KINGDOM



Political climate:

No laws against homosexuality, though public displays of affection are still technically illegal under the Common law. Legislation affording GLBT people equality in all aspects of life have been enacted with little resistance since the late 1990s.

Anti-discrimination laws in place.

Same-sex unions: Civil partnership.

Same-sex adoption allowed in England, Wales and Northern Ireland since 2005, Scotland since 2006.

Cultural climate

The UK is arguably the leading European GLBT consumer market. With an economy that seeks continual expansion though decentralization and a growing private sector, many multinational corporations are thriving in Britain.

Global corporations are taking advantage of country's diverse workforce and open market policy. Free market policies have contributed to economic growth along with an ability to leverage their diversity into positive market outcomes.

British tourism is predominantly based on its cultural history; GLBT campaigns now focus on London, Manchester and Brighton, while travel companies.

The UK's large population ensures that clubs, pubs, concerts and festivals cater to a large GLBT community.

Market development

The UK should be considered a Tier-1 development market <http://en.wikipedia.org/wiki/OutRage!>

Economic assessment

The UK is a first class example of what the rest of Europe should aspire to when it comes to GLBT business.

The leading GLBT business organization is Stonewall UK, which has the mission of driving equality in the workplace as well as society at large. An annual diversity conference and the Stonewall Diversity Awards (much like the US's Corporate Equality Index) highlights corporations that are succeeding in their efforts at diversity inclusion.

The firmly established umbrella GLBT association is the Gay Business Association. A variety of professional groups representing specific business interests and professions have developed throughout England, Scotland and N. Ireland.

Along side these organizations is an extensive union support network.

Online networks are also extensive.

The UK is a premium site of multinational businesses that market and cater to the GLBT population from Accenture, IBM Renault, Air France, KLM, Credit Suisse, RBS, Morgan Stanley, and Citigroup to name a few.

The UK GLBT business community has benefited from the UK's close ties to the United States. The greatest American import to the UK comes in the form of a political-economic model that has rocketed the UK ahead of its European competition with it comes to diversity marketing and GLBT business.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 60 776 238 | 3 646 574 | 31 423 | 114 586 294 802 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|-----------|----------------------|-------------------|------------------------------|
| Good | 66.4% | Excellent | - | Good | High |



Political climate: Improving

No laws against homosexuality.

Anti-discrimination laws in place in only 20 states and 100 county, city or council areas.

Same-sex unions: Civil Unions: Vermont, Connecticut, New Jersey and New Hampshire. Domestic partnerships: California, Maine, Oregon (Delayed), Washington, District of Columbia and Hawaii. Same-sex marriage performed and/or recognised: in Massachusetts and only recognized in New York, New Mexico and Rhode Island.

Same-sex adoption allowed in 10 states and 25 County, City or Council areas.

13 states protect sexual orientation and gender identity, 7 only cover sexual orientation and 30 do not cover either.

Cultural climate

The US is the world leader in GLBT marketing and GLBT human capital campaigns. But it is also one of the most polarized nations in the world in terms of political ideology and social acceptance. Religion often underpins this polarity. Despite this, the American business drive for expansion, growth and development of capital seems to bind contradictory ideologies together in a shared pursuit of economic success.

There are major GLBT hubs in most American cities that have a large base of exciting tourist activities, pride celebrations and other GLBT cultural events.

The United States has a large, well-funded outspoken GLBT activist community along with various other NGOs focused on all aspects of life: health, business, leisure, human rights, etc.

Market development

The US is a clear Tier-1 development market.

Economic assessment

The USA is the global GLBT business capital, leading the way in diversity campaigns, advertising campaigns and the development of GLBT business.

The United States has various tiers of GLBT business associations with strong national representation by the NGLCC, supporting state level associations, and further extending down to a multiplicity of organizations in major cities like New York, San Francisco, Boston, Chicago, Atlanta and Los Angeles to name a few.

These cities and organizations host many conferences like the Out & Equal, NGLCC Annual Conference GLBT Life and Business Expos, Equality Forum, HX Travel Expos and the IGLTA's annual convention.

There have been GLBT advertising across most business sectors including banking, technology, consumer package goods, automotive and healthcare.

Further, the US has many media platforms for GLBT marketing from GLBT television, radio, internet and national and regional print.

The United States have the world largest consumer economy, and the greatest PPP income in the world. In terms of the GLBT market potential, this translates into big money, which has not gone unnoticed by corporations seeking new opportunities.

| Total Population | Est. G/L Pop (6%) | Est. G/L Individual Inc (€) | Est. G/L Spending Power* (€) |
|------------------|-------------------|-----------------------------|------------------------------|
| 302 000 000 | 18 200 000 | 40 948 | 745 253 600 000 |

| G/L Media Outlets | Internet Penetration (GM) | G/L NGOs | GLBT Identity rating | Political climate | Marketplace readiness rating |
|-------------------|---------------------------|-----------|----------------------|-------------------|------------------------------|
| Excellent | 90.7% | Excellent | - | Moderate | High |

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