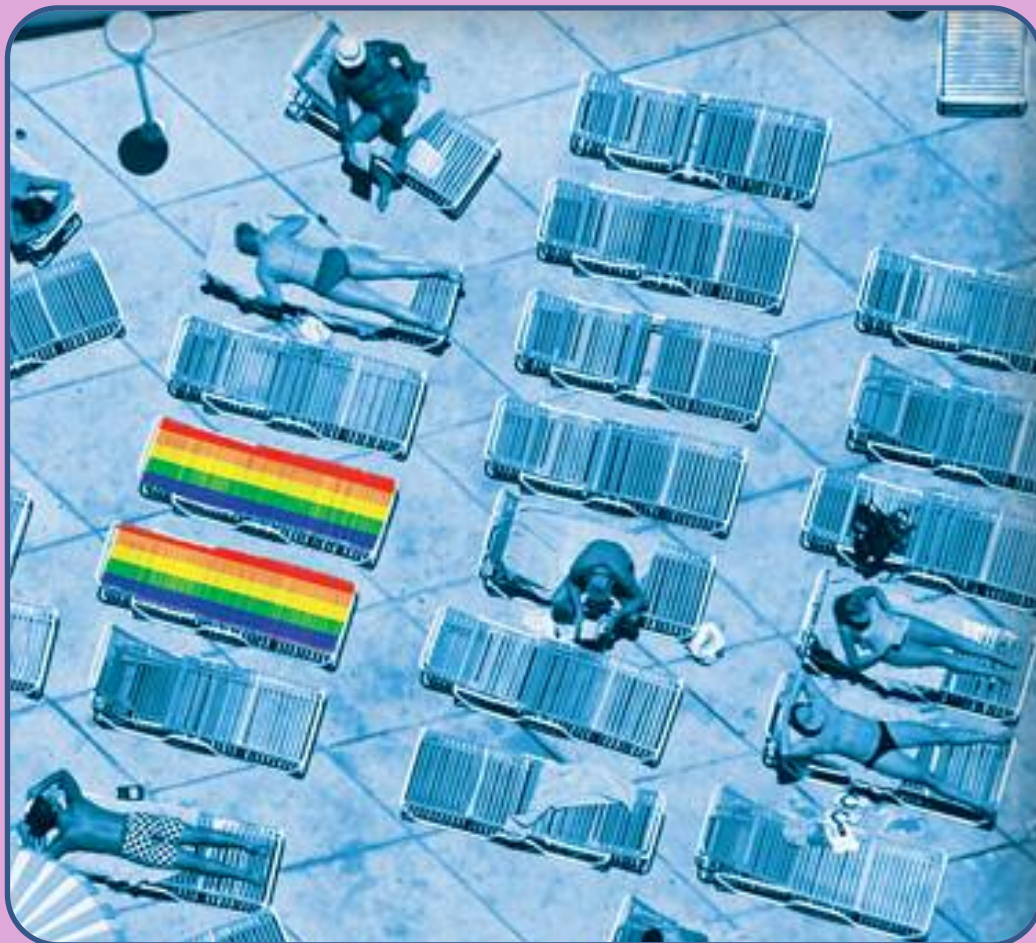


16th Annual Gay & Lesbian Tourism Report

*Exploring tourism and hospitality opportunities
in the gay and lesbian marketplace.*

2011-2012



Special Thanks to This Year's Study Sponsors & Partners



Introduction

Key findings from CMI's 16th Annual LGBT Tourism Study have been compiled from responses from self-identified gay and lesbian consumers who read LGBT publications, visit LGBT websites, and attend LGBT events. With over 10,000 respondents, this study polled more qualified, community-representative respondents than any other LGBT tourism survey, and offers valuable insights about consumers who may be reached through LGBT-dedicated marketing initiatives.

In addition to the Tourism Study, CMI produces online surveys, focus groups, field studies and customer satisfaction evaluations for a wide variety of clients including CVBs, DMOs and tourism offices, tour operators, hospitality groups, real estate developers, etc. In the year 2011 alone, CMI collected and analyzed over 100,000 gay and lesbian survey responses.

According to the U.S. Department of Commerce, the travel and tourism industry in the United States generated more than \$1.3 trillion in economic output in 2010. Based on this data and CMI sample demographics, we estimate that the annual economic impact of LGBT travelers is over US\$65 billion per year in the U.S. alone.

Methodology

From September 20, 2011 to October 31, 2011, Community Marketing, Inc. (CMI) conducted an online survey of self-identified gay and lesbian individuals selected from CMI's proprietary survey panel regarding their travel habits and motivators, in order to provide data and insight to the tourism, travel and hospitality industries.

This report contains an analysis of the results for the 6,700 USA resident responses and 540 Canadian resident responses.

Community Marketing has developed its travel survey panel over the last 15+ years by partnering with leading media companies from across the United States and beyond, as well as with LGBT organizations and events. Subscribers to our survey panel received an email invitation to take a gay/lesbian travel survey, with an incentive to win cash prizes in a random drawing. In order to keep the survey panel geographically balanced to reflect the US Census same-sex partner data (which is important for the destination rankings), multiple invitations are distributed to panel members living in underrepresented regions until the profile was geographically balanced.

We make no attempt in this study to define the size of the LGBT population (which is virtually impossible for many reasons), nor are these findings intended to represent or profile the entire US gay and lesbian population (similarly challenging). Instead, these findings are designed to provide guidance to tourism companies and destinations looking to outreach to the LGBT community through LGBT media, events and organizations, as survey participants reflect gay men and lesbians that interact with LGBT media, events and organizations.

For more information about this report, or to inquire about cross tabs or custom tourism, hospitality or other research studies, contact David Paisley at david@communitymarketinginc.com.

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Survey Demographics

This demographic profile represents over 6,700 study participants who live in the United States and 540 living in Canada. The purpose of the survey is to give guidance to travel companies considering advertising in the gay and lesbian media (print and Internet), and/or considering sponsorship of LGBT community organizations and events. Results in this report are presented by demographic segment.

Select Survey Panel Demographics

	Gay/Bisexual Men – USA	Lesbian/Bisexual Women - USA	USA LGBT Under 35	LGBT Canadians
TOTAL	5643	1005	1387	543
Living with Partner	45%	63%	36%	44%
Single/Dating	55%	37%	64%	56%
Under \$50K Income	24%	29%	42%	20%
Over \$100K Income	38%	27%	19%	33%
Children Under 18?	3%	19%		
Age Under 35	20%	26%	100%	23%
Age 36-54	53%	49%	0%	49%
Age 55+	27%	25%	0%	28%
California	18%	15%	16%	44% ON
Texas	7%	7%	8%	23% BC
Illinois	5%	4%	6%	13% AB
New York	9%	7%	11%	10% QC
Florida	8%	6%	4%	10% Other
Gay Man	97%	0%	78%	86%
Lesbian	0%	91%	15%	10%
Bisexual	4%	11%	8%	5%
Queer	2%	5%	6%	3%
Transgender	1%	2%	2%	1%
<i>Multiple selections allowed</i>				
White	85%	82%	75%	87%
Latino/Hispanic	7%	6%	13%	1%
Black/African American	4%	7%	5%	1%
Asian/Pacific Islander	4%	3%	8%	5%
Native American	1%	2%	2%	1%
Mixed	3%	6%	6%	3%
Other	1%	2%	1%	2%
<i>Multiple choices allowed</i>				

Key Results and Observations

1. Overall, the LGBT community has increased their travel in the last year, compared to the year before. Most destinations surveyed increased LGBT travel by 1 to 3% in the past year. This is in contrast to the last two years, which saw a decrease in LGBT travel due to the global economic recession, the first time in over 16 years of sampling.
2. CMI's annual destination rankings did not see much change from the previous year. However some cities did see a more significant increase. New York City has always been the number one LGBT destination in the USA and the city has slightly increased its lead over the traditional second and third place cities of San Francisco and Las Vegas. New Orleans continues to gain visitors and is approaching pre-Katrina rankings. Miami has increased its LGBT tourism and has jumped back into the top ten for USA destinations.
3. New York City scored #1 in all three key indicators; actual visits to the destination in past 12 months, most gay-friendly destination in the world and personal favorite destination. Las Vegas, San Francisco and London also scored well in all three indicators.
4. Considering their size and number of hotel rooms, Provincetown, Key West and Palm Springs scored extremely well in all three indicators. If you would analyze the data by number of hotel rooms in a destination, these three destinations would be the most popular in the United States.
5. In the USA, 85% of gay male survey respondents and 77% of lesbians own a valid passport. More impressively, 54% of gay men used their passport in the last year.
6. The LGBT community is much more likely to describe themselves as "urban core travelers" than "eco travelers" or "outdoor adventure travelers." Gay men are much more likely to describe themselves as both "urban core travelers" and "warm weather travelers." Gay men and LGBTs under 35 are far more likely to indicate that they are "urban core travelers" than lesbians.
7. Survey results suggest the mid-range market is the biggest group among LGBT travelers, followed by economy/budget, and then luxury.
8. The LGBT economy/budget market is larger than many people assume. Far more LGBT travelers consider themselves to be "economy/budget travelers" than "luxury travelers," indicating an opportunity for every tier of travel marketers. "Budget traveling" is not about income; it is about consumers spreading their travel funds across as many vacations as possible. Among economy/budget LGBT travelers, only about a third indicated they stay at economy hotels because they are low income. Most indicate they would rather spend their money on more frequent vacations, local attractions or restaurants.
9. Approximately 3% of gay men and 19% of lesbians indicated having children under 18 living at home. Once gay men or lesbians have children, family-friendly travel preferences become more important than LGBT-friendly travel preferences by a 2-1 margin.
10. Attending LGBT events are key motivators within the LGBT community, generating a high number of hotel nights. On average, gay men and lesbians spend 3 nights in a destination when traveling for an event.

11. Before booking a trip, gay men and lesbians compare on average three to four websites before making a purchase.
12. Results indicate that gay men and lesbians are more likely to travel to a destinations with gay-friendly reputations / laws. However, the survey asked a number of questions in different ways to analyze the effectiveness of LGBT destination boycotts. Community Marketing, Inc. focus groups indicate that while corporate boycotts can be effective, destination boycotts are not effective because many LGBT people don't penalize communities/people because of national or state laws. The survey results confirm these findings. Only about a third of gay men and lesbians are inclined to not travel to destinations with anti-gay bias. More importantly, it became clear that a destination's reputation for anti-gay violence is a better predictor than anti-gay laws in deterring LGBT travel. News stories about gay bashing in a destination may in fact be more damaging than anti-gay laws (although these two considerations are often related).
13. The top four motivators in choosing one hotel over another are the hotel's location, price, free Wi-Fi internet access and the hotel's gay-friendly reputation.
14. "Gay Pride" is still a significant travel motivator for LGBTs under 35. The younger generation is more likely to travel to another city for Pride than their older LGBT counterparts.
15. 71% of gay men and 62% of lesbians own a smart phone, and 60% of LGBT smartphone owners use their smartphones during their trips to finds local tourism resources.

Section 1: Travel Over Past 12 Months

Question: First, let's look at your overall travel for the past 12 months. Comparing your travel during the past 12 months to your travel in the year before that, did you travel more, about the same, or less than the previous year?

Analysis: Overall, the LGBT community is reasonably positive about travel, and indicated an increased number of trips over the past 12 months. This is in contrast to the last two years, which saw a decrease in LGBT travel. LGBTs under 35 were most likely to increase their travel over the last 12 months, which is partially a function of their age (i.e. travel becomes more important and more fiscally possible for young adults compared to the previous year). Canadians also were more likely to travel, probably because of their country's comparatively positive economic performance over the last year. "Staycations," or regional vacations, significantly increased in popularity over the past 12 months.

USA Gay and Bisexual Men N=5476

	Travel decreased	About the same	Travel increased
Overall travel	27.3%	40.6%	32.1%
Leisure/vacation/holiday travel	26.1%	45.2%	28.8%
Business travel	33.9%	41.0%	25.1%
Number of flights taken	27.6%	40.6%	31.8%
Number of nights in hotels	25.1%	38.9%	36.0%
Number of cruises	42.0%	42.5%	15.4%
Number of local/regional staycations or drive vacations	17.2%	51.3%	31.5%

USA Lesbians and Bisexual Women N=981

	Travel decreased	About the same	Travel increased
Overall travel	29.9%	38.1%	32.0%
Leisure/vacation/holiday travel	27.4%	42.7%	29.9%
Business travel	30.0%	43.1%	26.9%
Number of flights taken	30.2%	39.9%	29.9%
Number of nights in hotels	25.8%	36.2%	38.0%
Number of cruises	43.8%	39.5%	16.8%
Number of local/regional staycations or drive vacations	14.9%	46.3%	38.8%

USA LGBT Under 35 N=1387

	Travel decreased	About the same	Travel increased
Overall travel	23.2%	34.7%	42.1%
Leisure/vacation/holiday travel	22.9%	39.6%	37.5%
Number of flights taken	24.5%	34.2%	41.3%
Number of nights in hotels	21.7%	34.9%	43.3%

LGBT Canadians N=528

	Travel decreased	About the same	Travel increased
Overall travel	22.9%	44.1%	33.0%
Leisure/vacation/holiday travel	22.1%	46.4%	31.6%
Number of flights taken	24.6%	42.1%	33.3%
Number of nights in hotels	21.5%	39.6%	39.0%

Section 2: Number of Trips Taken

Question: How many total trips did you take in the past 12 months, where you stayed in paid accommodations at least one night? Please mark a number in each category, leisure and business. (Overnight trips in last 12 months.)

Analysis:

USA Gay and Bisexual Men	N=5476
USA Lesbians and Bisexual Women	N=988

USA Gay and Bisexual Men reported an average of...

- 3.9 leisure trips in the last 12 months
- 2.4 business trips in the last 12 months
- 3.8 round trip airline flights

USA Lesbians and Bisexual Women reported an average of...

- 3.3 leisure trips in the last 12 months
- 1.6 business trips in the last 12 months
- 2.6 round trip airline flights

Section 3: Use of Passports

Question: Did you use your passport in the last 12 months? (Respondents were allowed to choose multiple responses.)

Analysis: In the USA, 85% of gay men and 77% of lesbians own a passport. More impressively, 54% of gay men used their passport in the last year. International travel is much stronger in the gay male community than among the lesbian community in the USA. Canadian LGBTs are even far more likely to have a Passport and use it than USA LGBTs.

USA Gay and Bisexual Men

N=5643

Response	Frequency
Yes, to travel to a country on the continent where I live	22.6%
Yes, for travel to another continent	31.2%
I have a passport, but I did not use it in the past 12 months	39.7%
I DO NOT HAVE A PASSPORT	14.7%

USA Lesbians and Bisexual Women N=1005

Response	Frequency
Yes, to travel to a country on the continent where I live	18.1%
Yes, for travel to another continent	19.2%
I have a passport, but I did not use it in the past 12 months	42.9%
I DO NOT HAVE A PASSPORT	23.4%

LGBT Canadians N=543

Response	Frequency
Yes, to travel to a country on the continent where live	66.1%
Yes, for travel to another continent	37.8%
I have a passport, but I did not use it in the past 12 months	12.7%
I DO NOT HAVE A PASSPORT	7.7%

Section 4: Hotel Selection

Question: In what type of accommodation(s) did you stay in on your most recent vacation/holiday? (Please mark all that apply.)

Analysis: The LGBT community stays in all types of hotels, from economy to luxury. However, mid-range hotels are the most popular.

USA Gay and Bisexual Men

N=5591

Response	Frequency
Luxury hotel	22.1%
Boutique hotel	16.4%
Mid-range hotel	34.5%
Budget hotel	15.4%
LGBT guesthouse / hotel	11.1%
Rented apartment / condo	8.3%
My own time-share or fractional ownership unit	3.2%
Stayed free with family or friends	23.8%
Other or not applicable	7.0%

USA Lesbians and Bisexual Women

N=999

Response	Frequency
Luxury hotel	16.0%
Boutique hotel	10.8%
Mid-range hotel	33.3%
Budget hotel	14.2%
LGBT guesthouse / hotel	4.2%
Rented apartment / condo	9.2%
My own time-share or fractional ownership unit	4.6%
Stayed free with family or friends	26.8%
Other or not applicable	10.6%

Section 5: Hotel Incentives

Question: Many hotels are creating “packages” for the LGBT community. Below is a list of elements that might be included in a package. Which incentives motivate you to purchase a hotel package?

Analysis: While the chart below is only for gay and bisexual men, we observed was no significant difference among lesbians. When hotels put together packages for the LGBT community, price discounts and complementary food and alcohol are the top motivators. These amenities seem more important than LGBT specific incentives.

USA Gay and Bisexual Men N = 5500

	Very Motivating	Somewhat Motivating	Not Motivating
15% discount on price of room	60.4%	34.7%	4.9%
Buy two nights get a third free	59.4%	34.3%	6.3%
\$50 VISA Shopping Card	53.2%	36.1%	10.7%
Free breakfast	44.6%	42.8%	12.7%
\$25 credit at hotel restaurant	37.0%	47.2%	15.8%
10% discount on price of room	34.3%	52.3%	13.4%
Free tickets to a special LGBT event	31.7%	48.0%	20.2%
Free welcome cocktails	29.0%	40.2%	30.8%
Extra hotel loyalty points	26.3%	39.8%	33.9%
Bottle of wine in room	25.2%	37.7%	37.1%
Printed LGBT guide or map	22.0%	47.7%	30.3%
Donation or membership to LGBT organization like HRC	17.6%	48.2%	34.2%
Pass to local gym	18.7%	38.1%	43.2%
Subscription to LGBT publication	11.5%	35.9%	52.6%

Section 6: Hotel Amenities

Question: Overall, which amenities are most important to you when booking a hotel?

Analysis: Great location and free internet/Wi-Fi are, by far, the most important amenities desired by gay men and lesbians. While there are some slight differences between men and women, the genders were remarkably similar in their amenity desires.

USA Gay and Bisexual Men N=5577

USA Lesbians and Bisexual Women N= 994

	Very Important Men / Women	Somewhat Important Men / Women	Not Important Men / Women
Great location	76.1% / 73.7%	22.0% / 25.2%	1.9% / 1.1%
Free internet / wi-fi	73.7% / 70.7%	20.3% / 21.4%	6.0% / 7.8%
Free breakfast	36.9% / 44.7%	46.9% / 44.6%	16.2% / 10.7%
Pool	27.3% / 26.9%	44.9% / 42.5%	27.8% / 30.6%
Gym / fitness center	22.1% / 18.1%	40.8% / 35.0%	37.1% / 46.9%
Luxury linens	21.0% / 21.0%	47.1% / 47.3%	31.9% / 31.7%
High-end design	19.3% / 12.7%	46.7% / 45.1%	34.0% / 42.2%
Free cocktail hour	18.8% / 16.6%	36.6% / 30.0%	44.6% / 53.4%
In-hotel restaurant	18.5% / 21.4%	47.1% / 49.8%	34.5% / 28.8%
Upscale toiletries	16.8% / 16.2%	43.6% / 42.9%	39.6% / 40.9%
Impressive lobby	10.5% / 8.0%	43.4% / 40.2%	46.1% / 51.8%
Business center	8.9% / 8.7%	34.5% / 33.6%	56.6% / 57.7%
In-room mini bar	5.7% / 4.8%	18.0% / 16.7%	76.3% / 78.6%

Section 7: Motivations in Hotel Choice

Question: How important are each of the following to you in deciding to stay at one hotel over another?

Analysis: Among both gay men and lesbians, location of hotel, price and gay-friendly reputation of hotel / brand were the most important reasons to stay at one hotel over another. Traveler reviews on mainstream sites was also very strong. While LGBT-specific motivators did not rank as strong as mainstream motivators, many of the LGBT motivators listed are the key ways in which companies build a gay-friendly reputation (which ranked number three).

USA Gay and Bisexual Men

N= 5561

	Very Important	Somewhat Important	Not Important
Location of hotel in destination	84.0%	14.6%	1.4%
Price	79.0%	19.3%	1.7%
Gay-friendly reputation of hotel / brand	51.1%	42.3%	6.6%
Traveler reviews: mainstream sites	39.1%	47.8%	13.1%
Hotel's design / vibe	32.5%	51.4%	16.1%
Traveler reviews: LGBT sites	30.2%	50.7%	19.0%
Hotel's loyalty program	25.5%	41.0%	33.4%
Hotel / brand advertises in LGBT media	24.2%	53.7%	22.1%
Hotel / brand sponsors LGBT events	23.0%	54.7%	22.3%

USA Lesbians and Bisexual Women

N= 989

	Very Important	Somewhat Important	Not Important
Location of hotel in destination	84.4%	13.9%	1.7%
Price	84.6%	14.6%	0.8%
Gay-friendly reputation of hotel / brand	52.1%	42.5%	5.4%
Traveler reviews: mainstream sites	43.2%	47.1%	9.7%
Traveler reviews: LGBT sites	30.9%	50.6%	18.5%
Hotel / brand sponsors LGBT events	28.3%	54.0%	17.7%
Hotel's design / vibe	27.4%	55.7%	16.9%
Hotel / brand advertises in LGBT media	25.5%	56.9%	17.5%
Hotel's loyalty program	20.2%	42.3%	37.5%

Section 8: Mainstream Destination Motivators

Question: Think back to your travels over the past 12 months. From the “everyday” list below, what are your top motivators for choosing one destination over another? (You can only choose up to five.) (Respondents were allowed to choose multiple responses.)

Analysis: For both gay men and lesbians, exploring “new destinations,” and “rest and relaxation” were top motivators. Lesbians were much more likely to indicate that “visiting friends and family” and “romance with a partner” were motivators.

USA Gay and Bisexual Men N=5574
USA Lesbians and Bisexual Women N=992

Response	Frequency Gay Men / Lesbians
Explore new destinations	63.9% / 64.0%
Rest and relaxation	59.1% / 60.8%
Return to favorite destinations	56.2% / 49.7%
Visit family or friends	51.4% / 61.7%
Culture (art, architecture, music, theatre, etc.)	54.3% / 51.4%
Food and wine	33.4% / 26.5%
Romance with a partner	32.9% / 49.0%
Adventure travel (hiking, kayaking, cycling, etc.)	20.0% / 26.4%
Shopping	19.5% / 12.8%
Mainstream event in destination	19.0% / 20.2%
Combine destination with a cruise	9.9% / 8.9%
Spa	7.1% / 6.3%

Section 9: LGBT Destination Motivators

Question: Think back to your travels over the past 12 months. From the "Media and LGBT" list below, what are your top motivators for choosing one destination over another? (You can only choose up to five.) (Respondents were allowed to choose multiple responses.)

Analysis: For both gay men and lesbians, a “destination’s reputation for being LGBT welcoming” is by far the biggest motivator. However, after LGBT reputation, gay men and lesbians have significantly different destination motivators.

USA Gay and Bisexual Men N=5180
USA Lesbians and Bisexual Women N=882

Response	Frequency	
	Gay men	Lesbians
Destination's reputation for being LGBT welcoming	62.4%	69.8%
LGBT bars, clubs, parties, etc.	47.5%	33.7%
Recommendations of friends in LGBT community	47.1%	54.0%
Visit the LGBT neighborhood	45.1%	35.1%
Sexual adventure	28.7%	5.6%
Attend LGBT Event	24.2%	32.5%
LGBT website articles	24.1%	22.7%
Mainstream magazines or newspaper articles	23.8%	23.4%
LGBT print magazine or newspaper articles	23.1%	22.7%
Mainstream website articles	22.5%	24.5%
Destination's same-sex marriage laws	15.6%	27.8%

Section 10: Destination Boycotts

Analysis: Results indicate that gay men and lesbians are more likely to travel to a destination with a gay-friendly reputation / laws. However, the survey asked a number of questions in different ways to analyze the effectiveness on LGBT destination boycotts. Community Marketing, Inc. focus groups indicate that while corporate boycotts can be effective, destination boycotts are not effective because many LGBT people don't penalize local communities/people because of national or state laws. The survey results confirm these findings. Only about a third of gay men and lesbians are inclined to not travel to destinations with anti-gay bias. More importantly, a destination's reputation for anti-gay violence is a closer predictor than anti-gay laws in deterring LGBT travel. News stories about gay bashing in a destination may in fact be more damaging than anti-gay laws (although these two considerations are often related).

Do you agree with the following statements?

USA Gay and Bisexual Men	N=5610
USA Lesbians and Bisexual Women	N=1002
USA LGBT Under 35	N=1397

I think more positively about states / countries that approve same-sex marriage.

Gay men: 85% agree	Lesbians: 92% agree	LGBT Under 35: 86% agree
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I am more likely to travel to states / countries that approve same-sex marriage.

Gay men: 56% agree	Lesbians: 63% agree	LGBT Under 35: 61% agree
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I travel to gay-friendly cities and towns, even if located in gay un-friendly states or countries.

Gay men: 59% agree	Lesbians: 61% agree	LGBT Under 35: 64% agree
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I avoid destinations that have a reputation for anti-gay violence.

Gay men: 81% agree	Lesbians: 84% agree	LGBT Under 35: 76% agree
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I avoid destinations that have anti-gay laws.

Gay men: 65% agree	Lesbians: 64% agree	LGBT Under 35: 57% agree
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I ask my straight friends and family to avoid destinations that have a reputation for being gay un-friendly.

Gay men: 34% agree	Lesbians: 36% agree	LGBT Under 35: 30% agree
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California, Florida and other U.S. states have passed restrictions on same-sex marriage. I think the LGBT community should not travel to these states.

Gay men: 19% agree	Lesbians: 20% agree	LGBT Under 35: 15% agree
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Many countries have rich historical and cultural attractions, but also have anti-gay laws. I think the LGBT community should not travel to these countries.

Gay men: 29% agree	Lesbians: 26% agree	LGBT Under 35: 22% agree
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* For space reasons, above gay men includes bisexual men, and lesbians includes bisexual women.

Section 11: LGBT Media Influencers

Question: Within the LGBT media, what is more likely to influence you when researching and making your destination selections?

Analysis: The key word of this question is “influence.” It is widely established that the LGBT community spends more time online than looking at print media. What this question demonstrates is that for destinations, editorial is more important than advertising, and large images in print magazines, television (and perhaps public space advertising) all carry significant influence. Of note is that electronic media (especially on smart phones) provides more influence with LGBTs under 35.

USA Gay and Bisexual Men N=5463
 USA Lesbians and Bisexual Women N=964
 USA LGBT Under 35 N=1372

	Major Influence			Some Influence			No Influence								
	Gay men /Lesbians/Under 35			Gay men /Lesbians/Under 35			Gay men /Lesbians/Under 35								
Articles on LGBT websites	26%	/	29%	/	30%	54%	/	51%	/	49%	20%	/	20%	/	21%
Articles in LGBT print magazines	28%	/	28%	/	25%	52%	/	52%	/	48%	20%	/	20%	/	27%
Display ads in LGBT print magazines	19%	/	19%	/	18%	54%	/	56%	/	49%	27%	/	25%	/	33%
LGBT travel maps	19%	/	20%	/	20%	50%	/	49%	/	46%	31%	/	31%	/	34%
LGBT display ads in guidebooks	15%	/	21%	/	17%	51%	/	52%	/	45%	34%	/	27%	/	38%
LGBT television shows	19%	/	21%	/	23%	45%	/	46%	/	42%	36%	/	33%	/	35%
Videos on LGBT websites	14%	/	11%	/	17%	46%	/	47%	/	45%	40%	/	42%	/	38%
LGBT email newsletters	12%	/	16%	/	12%	45%	/	49%	/	42%	43%	/	35%	/	46%
Banner ads on LGBT websites	9%	/	10%	/	11%	45%	/	47%	/	47%	46%	/	43%	/	43%
LGBT blogs	13%	/	14%	/	21%	40%	/	38%	/	44%	47%	/	48%	/	35%
LGBT Facebook pages	11%	/	17%	/	19%	35%	/	40%	/	42%	54%	/	43%	/	39%
LGBT iPhone or other smartphone	12%	/	10%	/	19%	30%	/	26%	/	45%	58%	/	64%	/	36%

Section 12: Use of Travel Guides/Website/Materials

Question: Which of the following travel materials have you used in the past 12 months for travel planning? (Mark all that apply.) (Respondents were allowed to choose multiple responses.)

USA Gay and Bisexual Men N= 5582

Response	Frequency
Mainstream printed city guides / destination brochures	53.0%
Mainstream travel websites that are city-specific	59.5%
Printed LGBT travel guides or maps	34.9%
LGBT travel websites that have city-specific information	56.3%
None of the above	18.6%

USA Lesbians and Bisexual Women N=1002

Response	Frequency
Mainstream printed city guides / destination brochures	53.2%
Mainstream travel websites that are city-specific	59.8%
Printed LGBT travel guides or maps	21.3%
LGBT travel websites that have city-specific information	45.2%
None of the above	21.5%

Question: Which of the following sections are most important to you when you view gay / lesbian specific guides, magazines or websites? (Select up to three) (Respondents were allowed to choose multiple responses)

USA Gay and Bisexual Men N=5446

Response	Frequency
Gay Bars / Clubs	61.1%
Mainstream Bars / Clubs	5.6%
Restaurants	45.7%
Shopping	13.4%
Accommodations / Hotels	61.0%
Arts and Culture Attractions	47.0%
LGBT History	9.7%
LGBT events	27.4%
Non-LGBT events in destination	9.6%
Lesbian / Women's section	0.1%

USA Lesbians and Bisexual Women N=974

Response	Frequency
Gay Bars / Clubs	22.6%
Mainstream Bars / Clubs	2.7%
Restaurants	39.7%
Shopping	7.2%
Accommodations / Hotels	52.3%
Arts and Culture Attractions	43.5%
LGBT History	13.4%
LGBT events	30.5%
Non-LGBT events in destination	7.9%
Lesbian / Women's section	60.4%

Section 13: Travel Purchases

Question: How did you purchase your most recent vacation? (Please mark all that apply)

USA Gay and Bisexual Men N= 5638

Response	Frequency
Website directly with suppliers (airlines, hotels, etc.)	64.5%
Website with an online travel agency (Travelocity, hotels.com, etc.)	34.6%
On my mobile phone (iPhone, Blackberry, Android, etc.)	6.9%
By calling airlines and hotels	11.9%
By calling or a visit to a local retail travel agency	4.8%
By calling or a visit to a group tour or cruise operator	3.9%
Other	11.2%

USA Lesbians and Bisexual Women N = 995

Response	Frequency
Website directly with suppliers (airlines, hotels, etc.)	58.8%
Website with an online travel agency (Travelocity, hotels.com, etc.)	34.0%
On my mobile phone (iPhone, Blackberry, Android, etc.)	3.8%
By calling airlines and hotels	9.5%
By calling or a visit to a local retail travel agency	5.6%
By calling or a visit to a group tour or cruise operator	4.1%
Other	13.9%

Question: Let's be a little more specific. Which methods of online booking did you use for your most recent vacation/holiday? (Select all that apply.)

USA Gay and Bisexual Men N= 4557

Response	Frequency
Hotel website	57.9%
Rental car website	24.9%
Airline website	58.0%
Online travel agency (such as Travelocity or Orbitz)	41.9%
LGBT travel website with booking service	4.2%
Tourism office website with booking service	1.8%
Retail travel agency website (aaa.com, jt.de, uniglobe.com)	2.9%

USA Lesbians and Bisexual Women N=792

Response	Frequency
Hotel website	52.0%
Rental car website	19.3%
Airline website	47.1%
Online travel agency (such as Travelocity or Orbitz)	40.2%
LGBT travel website with booking service	3.4%
Tourism office website with booking service	1.5%
Retail travel agency website (aaa.com, jt.de, uniglobe.com)	2.5%

Section 14: Website Price Comparisons

Question: About how many sites did you compare before you booked that trip?

Analysis: When booking a trip, the LGBT community compares on average three to four websites before making a purchase.

The following is the number of travel websites compared before purchasing a trip by segment.

USA Gay and Bisexual Men	3.6 websites
USA Lesbians and Bisexual women	3.9 websites
USA LGBT Under 35	3.6 websites
LGBT Canadians	3.9 websites

Section 15: Visitor Information Centers

Question: In the last year, have you stopped at a visitor information center at a destination you visited?

Analysis: When asked if the LGBT travelers had stopped at a visitor information center at a destination, responses by segment were:

USA Gay and Bisexual Men	44% yes
USA Lesbians and Bisexual Women	50% yes
USA LGBT Under 35	35% yes
LGBT Canadians	47% yes

Question: You indicated that you have used a destination visitor information center, please select the specific reasons. (Mark all that apply)

USA Gay and Bisexual Men

Response	Frequency
Ask about things to do in the area	51%
Get recommendations	42%
Ask directions	40%
Get maps and brochures	88%
Inquire about restaurants	32%
Inquire about shops	14%
Inquire about accommodations	10%
Ask about the gay neighborhood or local gay interests	22%

USA Lesbians and Bisexual Women

Response	Frequency
Ask about things to do in the area	51%
Get recommendations	40%
Ask directions	37%
Get maps and brochures	84%
Inquire about restaurants	31%
Inquire about shops	13%
Inquire about accommodations	10%
Ask about the gay neighborhood or local gay interests	16%

Section 16: LGBT Travel Self-Descriptors

Question: What kind of traveler are you? Do you consider yourself to be... (Mark all that apply)

Analysis: Strong differences were indicated between the different cohorts for this question. Gay men are much more likely to describe themselves as “urban core travelers” and “warm weather travelers.” Gay men and LGBTs under 35 are far more likely to indicate they are urban core travelers than lesbians. The LGBT economy / budget market is actually much bigger than the LGBT luxury market, especially among lesbians. The LGBT community is twice as likely to describe themselves as an “economy / budget traveler” than a “luxury traveler.” LGBTs under 35 are much more likely to indicate they are LGBT “party/event travelers.”

USA Gay and Bisexual Men	N=5638
USA Lesbian and Bisexual Women	N=1007
USA LGBT Under 35	N=1408
LGBT Canadians	N=543

Response	Frequency			
	Gay Men	Lesbians	Under 35	Canadians
Warm weather traveler	55%	48%	44%	60%
Urban core traveler	50%	28%	51%	57%
Beach traveler	45%	43%	45%	44%
Economy / budget traveler	45%	52%	54%	46%
Outdoor / active adventure traveler	28%	34%	34%	29%
Luxury traveler	28%	21%	25%	22%
Resort / spa traveler	26%	23%	24%	24%
LGBT party/event traveler	21%	19%	28%	19%
Eco / green traveler	12%	20%	14%	12%
Winter / ski traveler	11%	8%	14%	9%

Section 17: Economy / Budget Traveler Motivations

Question: You indicated that you are an economy / budget traveler. Which of the following statements apply to you? (Mark all that apply). I stay at budget / economy hotels because ...

Analysis: Among economy/budget LGBT travelers, only about a third indicated they stay at economy hotels because they are low income. Most indicate they would rather spend their money on more frequent vacations, attractions at a destination or in restaurants.

USA Gay and Bisexual Men N=2536

Response	Frequency
Low income	27.7%
I'm on disability / retired fixed income	12.0%
I have children	1.9%
I'd rather spend money on the destination's attractions	72.2%
I'd rather spend money on nice restaurants	47.6%
So I can take more trips	61.6%
My income allows me to stay at higher priced hotels, but I think it is a waste of money	38.6%
I feel more comfortable at budget hotels	12.3%

USA Lesbians and Bisexual Women N=526

Response	Frequency
Low income	35.4%
I'm on disability / retired fixed income	11.2%
I have children	8.6%
I'd rather spend money on the destination's attractions	69.2%
I'd rather spend money on nice restaurants	37.6%
So I can take more trips	57.0%
My income allows me to stay at higher priced hotels, but I think it is a waste of money	25.1%
I feel more comfortable at budget hotels	7.2%

Section 18: LGBT Business Travel

Question: Do you travel for business?

USA Gay and Bisexual Men	50% indicated yes
USA Lesbians and Bisexual Women	42% indicated yes
USA LGBT Under 35	46% indicated yes
LGBT Canadians	45% indicated yes

Question: When you are traveling for business, do you try to stay in LGBT-friendly hotels?

USA Gay and Bisexual Men	27% indicated always or often 43% sometimes 30% rarely or never
USA Lesbians and Bisexual Women	22% indicated always or often 42% sometimes 36% rarely or never
USA LGBT Under 35	25% indicated always or often 43% sometimes 32% rarely or never
LGBT Canadians	20% indicated always or often 41% sometimes 39% rarely or never

Section 19: LGBT Event Travel

Question: In the past 12 months, have you traveled to another city (requiring an overnight stay) to attend any of the following community events? (Mark all that apply.)

Analysis: Attending LGBT events are key motivators within the LGBT community, generating a high number of hotel nights. On average, gay men, lesbians and LGBTs under 35 spent 3 nights in a destination when traveling for an LGBT event.

USA Gay and Bisexual Men N=5638
 USA Lesbians and Bisexual Women N=1007
 USA LGBT Under 35 N=1408

Response	Frequency		
	Gay Men	Lesbians	Under 35
LGBT Pride event	21%	18%	25%
Lesbian community event	0%	11%	
LGBT professional association meeting or conference	5%	6%	
LGBT cultural, arts or film event	7%	7%	7%
LGBT ski event	2%	1%	
LGBT sports tournament	2%	2%	
LGBT circuit party / dance event	6%	3%	7%
LGBT theme event (like "Gay Days" in Orlando)	8%	4%	9%
LGBT rodeo	2%	1%	
"Imperial Court" event	1%	0%	
Bear community event	7%	0%	
Leather community event	6%	1%	
Women's event (not lesbian-specific)	0%	8%	
Bisexual community event	1%	1%	
LGBT families event	1%	2%	

Follow up question: Let's look at the most recent event that you attended in another city. How many nights did you stay in a hotel or paid accommodation on that trip? (If you stayed with a friend or just visited for a day, then select zero.)

On average, gay men, lesbians and LGBTs under 35 spent 3 nights in a destination when traveling for an event. There was no significant difference between the groups.

Section 20: Smart Phones

Question: Do you use an iPhone, Blackberry, Android or other "smartphone"-type mobile device?

Analysis:	USA Gay and Bisexual Men	71% indicated yes
	USA Lesbians and Bisexual Women	62% indicated yes
	USA LGBT Under 35	83% indicated yes

Follow up question: Among those indicating "yes" to the above question: In the last 12 months, did you use an iPhone, Blackberry, Android or other "smartphone"-type mobile device while preparing for a trip or while traveling?

USA Gay and Bisexual Men	48% indicated yes, while preparing for my trip 77% indicated yes, during my trip
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USA Lesbians and Bisexual Women	42% indicated yes, while preparing for my trip 73% indicated yes, during my trip
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USA LGBT Under 35	57% indicated yes, while preparing for my trip 82% indicated yes, during my trip
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Section 21: Smartphone Use While Traveling

Question: What did you use your smartphone for while preparing for your trip, and/or during your trip? (Mark all that apply.)

Analysis: USA Gay and Bisexual Men N=3266
 USA Lesbians and Bisexual Women N=487
 USA LGBT Under 35 N=1324

Response	Frequency		
	Gay men	Lesbians	Under 35
Staying in touch about the trip by email and/or texting	68%	70%	73%
Online maps (mainstream)	65%	58%	66%
Finding local mainstream resources (restaurants, attractions, etc.) at the destination	62%	63%	62%
Flight alerts (change of time, gate, etc.)	61%	47%	55%
Posting updates or photos on Facebook	58%	58%	74%
Finding LGBT resources (gay bars, restaurants, clubs, etc.) at the destination.	56%	32%	55%
Uploading photos or videos	55%	54%	63%
Researching a destination	51%	50%	54%
Hooking up at the destination	36%	12%	37%
"Checking in" or posting a comment with Foursquare, GayCities, etc.	34%	19%	43%
Online LGBT maps	20%	8%	17%
View official destination tourism websites	19%	19%	18%
Foreign currency convertors	19%	12%	14%
Booking hotels	17%	12%	15%
Booking flights	16%	11%	16%
Tweeting about your travels	14%	13%	26%
Foreign language translation	13%	9%	12%
Clicked on local offers or banner ads	7%	4%	8%

Section 22: Sharing Travel Experiences

Question: In the past 12 months, in which ways have you shared your travel experiences with others? (Mark all that apply.)

Analysis:

USA Gay and Bisexual Men	N=4629
USA Lesbians and Bisexual Women	N=487
USA LGBT Under 35	N=1324

Response	Frequency		
	Gay Men	Lesbians	Under 35
Posted updates on Facebook	68%	70%	86%
Posted my trip pictures and/or videos on Facebook	62%	70%	77%
Sent postcards	30%	30%	21%
Posted a review on a traveler review site (like Trip Advisor or Yelp)	25%	19%	20%
Uploaded a photo to a site (like Picasa or Flickr)	21%	18%	19%
Twitter updates	14%	14%	27%
Posted photos on my own blog or website	14%	11%	16%
Posted video to YouTube or other video site	7%	4%	9%
Posted reviews or photos on an LGBT travel website	4%	3%	3%
Posted photos on a general LGBT website	3%	2%	3%

Section 23: Children and LGBT Travel

Analysis: Approximately 3% of gay men and 19% of lesbians indicated having children under 18 living at home. Once gay men and lesbians have children, child-friendly travel options become more important than LGBT-friendly travel options by a 2-1 margin.

Question: Do you have children of any age?

Analysis:	USA Gay and Bisexual Men:	13% indicated yes	N=5638
	USA Lesbians and Bisexual Women:	32% indicated yes	N=1007

Question: Do you have children under 18 living at home?

Analysis:	USA Gay and Bisexual Men:	2.5% indicated Yes	N=5638
	USA Lesbians and Bisexual Women:	19.0% indicated Yes	N=1007

Question: If you had to pick one... When traveling with your children, what is more important to you and your family, when you are choosing a vacation destination?

For both gay men and lesbians with children under 18 at home

LGBT-friendly destination 32%

Child-friendly destination 68%

Question: If you had to pick one... When traveling with your children, what is more important to you and your family, when you are choosing a hotel?

For both gay men and lesbians with children under 18 at home

LGBT-friendly destination 34%

Child-friendly destination 66%

Section 24: LGBT Marriages and Civil Unions

Analysis: Our 2011 survey analyzed the impact of same sex marriage and civil unions. The same-sex marriage industry is emerging. CMI focus groups on the topic indicate that same-sex marriage ceremonies are different than opposite sex ceremonies in a number of ways:

- There is no “tradition” of marriage in the LGBT community. This gives the LGBT community the freedom to have any type of ceremony, and often that ceremony is cheaper.
- The LGBT community is more likely to combine the “ceremony” with the “reception” in the same venue, saving money.
- Many LGBT couples had been together for decades when “marriage” became legal in their states, and so producing a large ceremony made little sense.
- The commitment to spending is different depending on the “type” of union (i.e. “marriage” vs. “civil unions” vs. “domestic partnership.”) Same sex couples report a willingness to spend more on “marriage.”
- Traditional “wedding” support from parents is often little to none. When couples need to pay for the ceremony themselves, it is often done more cost effectively.
- Initially after a state changes its marriage laws, many couples get married almost immediately. Limited time to plan big weddings results in less expensive weddings.

The following are the results from the 2011 survey. These results are preliminary and will be used to help guide CMI for a more extensive study in 2012.

Question: Which of the following best describes is your current relationship status? Asked as part of demographic questions.

USA Gay and Bisexual Men:

14% indicated in a legally married / civil union / legal registered domestic partner N=5638

USA Lesbians and Bisexual Women:

24% indicated in a legally married / civil union / legal registered domestic partner N=1007

The survey identified 577 same-sex couples who entered into a legal marriage, civil union or domestic partnership in the past 5 years.

Of the 577 couples...

- 45% had a ceremony in their own town/region
- 32% traveled to a different location for their union and ceremony
- 23% got married in a way that involved no ceremony

Of those who had a ceremony or traveled, 28% of unions had 11 or more people book hotel rooms connected to their ceremony.

Of the couples, 54% had a reception connected to their union or ceremony.

- The average spend was about \$5,000
- 9% spent \$20,000 or more for their receptions

Where did they report having ceremonies and/or receptions?

- 15% used paid indoor or outdoor event space
- 14% used a their own home or friends home
- 11% used religious institutions or other location
- 10% used a city park or inexpensive space
- 8% used a hotel
- 42% had no specific ceremony location or and/or simply married at City Hall.

Of the 577 couples... 43% went on a honeymoon after their ceremony. 50% spent 7 or more days on their honeymoon

- 42% spent \$2500 or less
- 29% spend \$2500 to \$5000
- 29% spent over \$5000

Where did they travel to for their honeymoon?

- 50% of same-sex USA couples traveled to warm weather destinations for their honeymoon.
- 17% traveled to Europe.
- Many individual destinations were mentioned around the world, but no single destination received more than 4% of business.

Section 25: Top Destinations for American LGBT Travelers

Question: We are going to present you with a list of cities and countries around the world. Please tell us if you have visited these places in the past 12 months for leisure or business travel reasons and stayed overnight in a paid accommodation.

Analysis: CMI's annual destination rankings did not see much change from the previous year. Nearly all destinations saw a 1 to 3% increase in LGBT travel over the past year. However, some cities did see a more significant increase. New York City has been the number one LGBT destination in the USA throughout CMI's 16 years of LGBT travel sampling, and the city has slightly increased the distance over the traditional second and third place cities of San Francisco and Las Vegas. New Orleans continues to gain visitors and is approaching pre-Katrina rankings. Miami has significantly increased its LGBT tourism and has jumped back into the top ten for USA destinations.

Why do we group destinations?: CMI groups destinations when their LGBT travel percentages fall within a margin of error. We do this because many destinations tend to cluster around certain percentages and we prefer to present the data more as tiers than a specific ranking.

N = 6,775 LGBT USA residents.

Top 25 LGBT Destinations: Business and Leisure Combined

1. New York	35%
2. Chicago	27-29%
2. Las Vegas	27-29%
2. San Francisco	27-29%
5. Los Angeles	23-24%
5. Washington DC	23-24%
7. Fort Lauderdale	16-18%
7. San Diego	16-18%
7. Boston	16-18%
10. Atlanta	12-14%
10. Dallas	12-14%
10. Miami	12-14%
10. New Orleans	12-14%
10. Orlando	12-14%
10. Palm Springs	12-14%
10. Philadelphia	12-14%
10. Seattle	12-14%
18. Austin	7-10%
18. Baltimore	7-10%
18. Denver	7-10%
18. Hawaii	7-10%
18. Houston	7-10%
18. Key West	7-10%
18. Napa	7-10%
18. Phoenix	7-10%
18. Portland	7-10%
18. Provincetown	7-10%
18. Sonoma	7-10%
18. Tampa / St. Pete	7-10%

Top 20 Leisure Destinations (Not Including Business Travel)

1) New York City	25%
2) San Francisco	20-21%
2) Las Vegas	20-21%
4) Chicago	18-19%
5) Los Angeles	16-17%
6) Washington, DC	13-14%
6) Ft. Lauderdale	13-14%
8) Palm Springs, CA	11-12%
8) Miami	11-12%
8) Boston, MA	11-12%
11) Orlando, FL	9-10%
11) Philadelphia	9-10%
11) San Diego, CA	9-10%
11) Seattle	9-10%
11) New Orleans	9-10%
16) Atlanta	7-8%
16) Key West	7-8%
16) Hawaii	7-8%
16) Napa, CA	7-8%
16) Provincetown	7-8%
16) Sonoma, CA	7-8%

International Destinations

Top destinations attracting at least 4% of USA LGBT travelers in the last 12 months.

Europe

England	7%
France	7%
Italy	6%
Germany	5%
Spain	5%

Canada

Montreal	6%
Toronto	6%
Vancouver	5%

Mexico

Puerto Vallarta	5%
Cancun	4%

USA Resident LGBT Travel by Segment**Leisure Rankings: USA Gay and Bisexual Men**

- 1) New York
- 2) Las Vegas
- 2) San Francisco
- 4) Chicago
- 5) Los Angeles
- 6) Fort Lauderdale
- 6) Washington, DC
- 8) Palm Springs
- 9) Boston
- 9) San Diego
- 9) Orlando
- 9) Miami

Leisure Rankings: USA Lesbians and Bisexual Women

- 1) New York
- 1) San Francisco
- 3) Las Vegas
- 3) Chicago
- 5) Los Angeles
- 6) Washington, DC
- 7) Boston
- 8) Orlando
- 9) San Diego
- 10) Seattle

LGBT Canadians N=550

- 1) Toronto
- 1) Montreal
- 3) Vancouver
- 4) New York
- 5) Las Vegas
- 6) Ottawa
- 7) Calgary
- 8) Victoria
- 9) San Francisco
- 9) Quebec City
- 9) Seattle
- 9) Puerto Vallarta
- 9) England

Question: When you think about "gay-friendly" destinations in the world, what are the three that first come to mind (regardless of whether you've visited there or not)?

N=18,100 responses (i.e. each respondent can pick three). United States LGBT residents.

The top destinations indicated were:

San Francisco:	18%
New York:	10%
Amsterdam	5%
Key West	5%
Palm Springs	5%
London	5%
Provincetown:	5%

Question: Considering all the destinations in the world, what are your personal top three favorite destinations?

N=18,100 responses (each person can pick three). United States LGBT residents

The destinations indicated were:

New York:	10%
San Francisco:	7%
London:	6%
Paris	6%
Hawaii	5%
Italy	4%
Las Vegas	3%

ABOUT COMMUNITY MARKETING, INC.

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 over 18 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 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)
- 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
- Kimpton Hotels & Restaurants
- LA, Inc. (Convention & Visitors Bureau)
- MetLife
- MillerCoors Brewing Company
- NYC & Co.
- Prudential
- Starwood Hotels & Resorts
- Switzerland Tourism
- Travelocity
- U.S. Government (Census Bureau)
- U.S. Government (Housing & Urban Development)
- Wells Fargo Bank

And many others

CMI's LGBT Consumer Panel 2011

The facts are plain:

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% to 10% 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, ABSOLUT, MetLife, MillerCoors, Japan Airlines and Hyatt Hotels, as well as the U.S. Government (Census Bureau and HUD). We've completed hundreds of custom quantitative and qualitative research initiatives for clients worldwide. We also present public and custom on-site educational seminars and workshops. In the past year, Community Marketing produced and presented at LGBT marketing symposia on four continents.

Learn more on our website,
www.communitymarketinginc.com.

60,000+

gay, lesbian, bisexual
and transgender consumers

47 median age

51% live with partner

71% college grads

84% currently employed

72% hhi >\$50K

60% own a home

88% own a car

40% drink wine at home
weekly

69% drink at bars
and restaurants

spend **\$100** at bars &
restaurants per week

37% make purchasing
decisions at work

67% are on facebook

12% blog daily

Past 12 mo.
purchases

automobile 19%

smart phone: 30%

laptop computer: 33%

hdtv: 27%

running shoes: 36%

primary home 6%

vacation home 2%

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.