

# 14th Annual Gay & Lesbian Tourism Report

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

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# CMI's 14th Annual Gay & Lesbian Tourism Study

**December 28, 2009**  
**N= 4,726**

## ***INTRODUCTION***

Findings from Community Marketing, Inc.'s (CMI) *14th Annual Gay & Lesbian Tourism Study* have been compiled from responses from self-identified gay and lesbian consumers who read LGBT publications, visit LGBT websites, interact with LGBT organizations and/or attend LGBT events. With over 4,700 responses, CMI samples far more qualified respondents than any other LGBT tourism research, and offers valuable insights about consumers who may be reached through LGBT-dedicated marketing initiatives.

In addition to the *Tourism Study*, CMI produces the annual LGBT Consumer Index®, online surveys, telephone interviews, focus groups, field studies and customer satisfaction evaluations for a wide variety of clients including CVBs, DMOs and tourism offices, tour operators, hospitality groups, developers, etc., as well as leaders in other industries. Based on tourism industry data from the US Department of Commerce and CMI sample demographics, the annual economic impact of LGBT travelers is approximately \$70.3 billion in the US alone.

This report contains a detailed statistical analysis of the results for the *14th Annual Gay & Lesbian Tourism Survey*. Of the 7,078 total survey participants in this year's study, 4,726 are LGBT consumers who reside in the United States.

## ***METHODOLOGY***

During the 30-day period from October 6, 2009 to November 5, 2009, 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, to provide data and insight to the tourism, travel and hospitality industries.

Community Marketing has developed its survey panel over the last 15+ years by partnering with leading media companies from across the United States, as well as LGBT organizations and events. Subscribers to this survey panel received an email invitation to take a gay/lesbian travel survey, with an incentive to win one of six prizes. In order to keep the survey panel geographically balanced to the US Census same sex partner data, a second invitation was sent to targeted geographic areas to balance regions that were initially underrepresented.

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 looking to outreach to the LGBT community through their media and events.

Some survey questions invite multiple responses, and in these cases, percentages total more than 100.

### ***Thanks to our media and event partners that contributed participants to this year's Study:***

Alpenglow Productions Corp.  
Bay Area Reporter  
Curve Magazine  
EDGE Publications  
fab Magazine  
FlawLes / FlawLes Magazine  
Gay Ad Network  
Gay Cities, Inc.  
Guide Magazine  
Hotspots  
IGLTA  
Lesbian Connection  
LGBT Community Center of Greater Cleveland  
Out Front Colorado  
Pink Banana Media  
Pride FM 103.9  
Pride Source Media Group  
Regent Media / Out.com  
Windy City Media Group  
Xtra & Xtra.ca

## ***SURVEY DEMOGRAPHICS***

The purpose of the survey is to give guidance to travel-related companies considering advertising in the gay and lesbian media (print and Internet), and connect through the communities events and organizations. The demographics of this survey are consistent with the reader profiles of the majority of LGBT media, trending significantly towards white and male (except for specific lesbian media), and middle aged.

This report provides data from United States respondents only.

The median age was 48.

75% were gay men, 25% lesbian, 3% bisexual, 1% transgender (multiple responses were permitted).

37% were single, 51% living with partner, 12% in relationship not living with partner.

6% had children under 18 living at home.

87% White, 5% Latino, 3% African American, 2% Asian, 3% other/mixed.

## **Top Ten Findings from CMI's 14<sup>th</sup> Annual Gay & Lesbian Tourism Survey**

For the past 14 years, Community Marketing, Inc. (CMI) has been conducting its Annual Gay & Lesbian Tourism Study, the most comprehensive and longest-running such survey in the LGBT marketplace. Many of the questions are asked in consistent ways to a similar study panel, in order to identify LGBT travel trends and changes over time. The following “top ten” list presents findings that the CMI research team views as important changes or observations from the past year. For those new to CMI’s research, all the questions provide important insight into the travel motivations, preferences and interests of gay men and lesbians.

### **1) Gay Men and Lesbian Booking Patterns**

Gays and lesbians are primarily booking their travel directly via airline and hotel websites (56%) or through online travel agencies such as Travelocity or Orbitz (34%). Direct booking is significantly more important than web-based travel services, so for travel suppliers, developing relationships with the gay and lesbian community to encourage direct booking through your own website is extremely important. Travel suppliers and destinations having an LGBT “microsite” with dedicated content is a positive motivator for LGBT consumers.

### **2) For the First Time in 15 years of sampling – A *Decrease* in LGBT Travel**

For the first time since our first study in 1994, CMI has seen a decrease in LGBT travel due to the deep and wide-reaching recession. This survey, taken in October 2009, was far more pessimistic than CMI’s survey taken in October 2008, which largely showed a net-even in travel patterns. In the 2009 survey, nearly all travel categories saw some loss (except for regional travel). Business travel and cruise travel were the hardest-hit categories. That said, far more LGBT travelers took cruises in the past year than their mainstream counterparts (as in previous years), indicating that LGBT travelers are a viable cruise market even in down economies.

### **3) Recession-Influenced Travel Decreases Affecting Small and Medium-Sized Markets Worse than Big Markets**

Every major city in North America except for Washington DC (perhaps an Obama effect) saw a decrease in gay and lesbian travel over the past 12 months. That decrease affected cities very differently. Major markets, including New York City, San Francisco and Las Vegas saw only small leisure travel decreases, usually less than 5%, while medium sized cities, destinations that are geographically isolated, and some resort towns saw more significant decreases over 10%, and for some, over 20%.

#### **4) Staycations**

Staycations were the only travel category to see an increase in 2009. When asked to specify how many regional drive vacations (i.e. including at least one night in a hotel) were taken, 66% indicated taking a longer regional drive vacation of more than two hours; 42% took a regional drive vacation where the drive was two hours or less; 14% took a trip where they stayed in a hotel in their own city. This trend should benefit some metropolitan markets. Cities such as Boston, New York, Philadelphia and Washington DC, which are all close to each other, will probably “trade” stays among LGBT residents.

Also of note is the 14% of gays and lesbians who reported taking a staycation at a hotel in their own town, defined as a very short drive or via public transportation. While this number may be smaller, with dedicated promotions this could be a way of filling hotel rooms during slower periods, especially if packaged with other local activities.

#### **5) How to Reach the LGBT Community**

CMI has been tracking advertising trends for LGBT travel marketing for over a decade. In general, the survey shows substantive increases in the influence of traveler reviews on travel websites and blogs, a softening of the influence of banner ads on mainstream and LGBT websites, and a remarkable resilience of the influence of travel articles in LGBT and mainstream print publications.

#### **6) Interest in Health and Fitness While Traveling is Down**

CMI has seen a trend over the past few years showing that health and fitness while traveling are becoming less important to the LGBT community. In this survey, when given a long list of potential motivators, health and fitness-related responses were near the bottom of the motivators, and often last on the lists. From hotel gyms to health and fitness vacations, they all scored poorly. This is not to say that health and fitness are not important in the day-to-day lives of gay men and lesbians, but bringing these healthy habits with them on leisure or business travel has shown less importance over time. It could also indicate that with tightening budgets, LGBT travelers prefer to spend more time enjoying the sights and experiences of the destination, rather than spend limited time in a gym.

#### **7) Pride Events are Important**

Unaffected by recessionary influences, nearly a quarter of the respondents reported traveling to another city and spending at least one night in a hotel to attend a Pride event; same as previous years. Nationally, Pride events continue to move millions of hotel nights in the United States, and Pride remains an important motivator for LGBT travelers under 35.

## **8) Strength of Local Neighborhoods**

Further confirming other recent research conducted by CMI, gays and lesbians tend to be especially interested in visiting city neighborhoods and experiencing local, non-chain restaurants. In fact, going to neighborhood restaurants and visiting the gay neighborhood were the top activities enjoyed by gays and lesbians when visiting a destination.

## **9) Top Travel Brands**

As an unaided question, survey participants were asked to fill in a blank for in the destination, hotel brand, and airline that they felt had done the best job in outreaching to the LGBT community.

Of the total sample, 3,800 responded to the destination question. The top destinations indicated were: Las Vegas: 11%, San Francisco: 10%, Fort Lauderdale: 7%, Philadelphia: 6%, Provincetown: 5%, and London: 5%.

Of the total sample, 2,800 responded to the hotel question. The top hotel brands indicated were: W Hotels: 11%, Kimpton Hotels: 11%, Hilton: 9%, Hyatt: 8%, and Marriott: 7%.

Of the total sample, 3,287 responded to the airline question. The top airlines indicated were: American Airlines: 38%, Southwest: 15%, Delta: 11% and Virgin: 3%.

## **10) Top Destinations**

CMI's list of top destinations remains amazingly consistent from year to year (based on the question of where did you travel in the past 12 months, and spend at least one night in a hotel).

The following lists are reflective of the 4,726 American LGBT survey takers, who traveled to the city in the past 12 months and spent at least one night in a hotel:

Top 25 US Destinations for American LGBT Travelers, with percentage who visited and spent a night in a hotel (as Combined Leisure & Business Travel Ranking)

- 1) New York City: 32%
- 2) San Francisco: 27%
- 3) Las Vegas: 26%
- 4) Chicago: 25%
- 5) Los Angeles / West Hollywood: 24%
- 6) Washington, DC: 23%
- 7) Fort Lauderdale: 17%
- 8) San Diego: 15%
- 9) Orlando: 14%
- 9) Seattle: 14%
- 11) Boston: 13%

- 11) Philadelphia: 13%
- 13) Palm Springs 12%
- 13) Atlanta: 12%
- 13) Miami: 12%
- 16) Dallas: 11%
- 16) Denver: 11%
- 16) Phoenix/Tempe/Scottsdale: 11%
- 19) New Orleans: 10%
- 20) Napa County, CA: 9%
- 20) Provincetown, MA: 9%
- 20) Sonoma County, CA: 9%
- 23) Portland, OR 8%
- 23) Baltimore: 8%
- 23) Tampa/St. Pete: 8%

Top 5 US Destinations for American LGBT Travelers (as Leisure Travel Ranking)

- 1) New York
- 2) Las Vegas
- 3) San Francisco
- 4) Los Angeles / West Hollywood
- 5) Chicago

Top 5 US Destinations for American LGBT Travelers (as Business Travel Ranking)

- 1) Chicago
- 2) New York
- 3) Washington DC
- 4) San Francisco
- 5) Los Angeles

Top Canadian Destinations for American LGBT Travelers

- 1) Toronto
- 2) Montreal
- 3) Vancouver

Top European Destinations for American LGBT Travelers

- 1) England
- 2) France
- 3) Germany
- 4) Italy
- 5) Spain

Below are the top destinations for segments within the full LGBT panel:

Top 5 Destinations for American Gay Men

- 1) New York
- 2) Las Vegas
- 3) San Francisco
- 4) Los Angeles / West Hollywood
- 5) Chicago

Top 5 Destinations for American Lesbians

- 1) Las Vegas
- 2) San Francisco
- 3) New York
- 4) Los Angeles / West Hollywood
- 5) Chicago

Top 5 Destinations for American LGBT Seniors Age 62+

- 1) New York
- 2) Las Vegas
- 3) Los Angeles / West Hollywood
- 4) Fort Lauderdale
- 5) San Francisco





Top 5 Destinations for American LGBT Young Adults Age 18-32

- 1) New York
- 2) Las Vegas
- 3) San Francisco
- 4) Chicago
- 5) Washington DC

<b>Survey Findings</b>
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### ***How Most Recent Vacation Was Purchased***

*How did you purchase your most recent vacation (not business travel)? (Respondents could only choose a single response)*

Response	Chart	Frequency	Count
<b>Directly with airlines and hotels (phone or website)</b>		<b>55.5%</b>	<b>2537</b>
Travel website like Travelocity, Orbitz etc.		33.5%	1532
Retail travel agency		6.5%	299
Tour operator group		4.4%	200
Not Answered			158
		<b>Valid Responses</b>	<b>4568</b>
		<b>Total Responses</b>	<b>4726</b>

Over half of participants (56%) said they had purchased their most recent vacation directly with airlines and hotels, whether by phone or a website. Another one-third (34%) reported purchasing the vacation through an online travel agency website like Travelocity or Orbitz.

### **Travel Compared to Previous Year**

*Comparing your travel over the past 12 months, have you traveled more, about the same or less than the previous year? (Change in Travel)*

	Travel decreased	About the same	Travel increased
Overall travel	34.6%	<b>39.3%</b>	26.1%
Leisure travel	32.8%	<b>42.3%</b>	24.9%
Business travel	<b>43.8%</b>	37.5%	18.7%
Number of flights taken	35.2%	<b>39.0%</b>	25.8%
Number of nights in hotels	32.5%	<b>37.6%</b>	29.9%
Number of cruises	<b>45.2%</b>	39.3%	15.5%
Number of local/regional staycations or drive vacations	19.5%	<b>48.1%</b>	32.5%
<b>Total</b>	<b>33.6%</b>	<b>40.6%</b>	<b>25.8%</b>

The largest percentages of respondents reported that compared to the previous year, their overall travel in the past year had remained the same (39%), as had their leisure travel (42%).

Of the 66% of those who reported any business travel, the greatest percentage (44%) said their business travel had decreased.

Of the 40% of respondents who reported taking cruises, the greatest percentage (45%) said the number of cruises they had taken had decreased compared to the previous year.

Looking at the bigger picture, more survey respondents reported a decrease in travel than an increase. This contrasts to the report of October 2008 that showed an equal number of respondents increasing travel as decreasing travel for a net neutral effect, and previous years when we saw travel increasing year over year.

### ***Number of Roundtrip Flights, and Flights in Business- or First-Class***










*About all your trips, business and leisure:*

	0	1	2	3	4	5	6	7	8	9	10+	Mean
How many total roundtrip air flights did you take in the past 12 months?	<b>20.8%</b>	14.7%	15.4%	11.1%	8.7%	5.9%	4.9%	2.6%	2.5%	1.1%	12.5%	4.450
How many of these flights were in business or first class?	<b>75.7%</b>	8.5%	5.4%	2.8%	1.8%	1.2%	0.8%	0.5%	0.6%	0.2%	2.6%	1.814

The majority (79%) of respondents reported at least one roundtrip air flight for business or leisure in the past year. 24% indicated that they took at least one business class flight in the past year.

### ***Used a Smart Phone to Research or Book Travel***

*When researching or booking travel, in the last 12 months have you used a smart phone or other hand-held mobile device? Check all that apply. (Respondents were allowed to choose **multiple** responses)*

Response	Chart	Frequency	Count
<b>I DON'T HAVE SUCH A DEVICE</b>		<b>47.5%</b>	<b>2245</b>
For staying in touch while I'm away (email, texting, Facebook, etc.)		37.3%	1761
For maps		30.5%	1443
For flight alerts (change of time, gate, etc.)		25.2%	1193
For finding local mainstream resources (restaurants, attractions, etc.) at the destination		25.2%	1192
For finding LGBT resources (gay bars, restaurants, clubs, etc.) at the destination		21.7%	1025
For researching a destination prior to departure		13.5%	639
For booking hotels		6.6%	313
For booking flights		5.3%	249
Other, please specify:		2.1%	100
		<b>Valid Responses</b>	<b>4726</b>
		<b>Total Responses</b>	<b>4726</b>

Asked about researching or booking travel with a smart phone, 48% of participants said they didn't have a smart phone. Over one-third (37%) said they used their phones to stay in touch while away, whether through e-mail, texting or Facebook. Some also reported using their phones for maps (31%), flight alerts (25%) or finding local mainstream resources at the destination (25%).

<b>Overnight Trips</b>
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### ***Overnight Trips With a Hotel Stay***

*How many overnight trips did you take in the last twelve months where you stayed in a hotel? Please mark a number in each category. (Overnight trips in last 12 months)*

	0	1	2	3	4	5	6	7	8	9	10+	Mean
Leisure trips (vacations)	10.5%	11.9%	<b>17.6%</b>	15.0%	12.0%	8.5%	6.9%	3.1%	3.1%	0.9%	10.4%	4.836
Business trips	<b>51.3%</b>	11.6%	9.1%	5.9%	4.0%	3.2%	2.3%	1.1%	1.3%	0.6%	9.6%	3.127

Reporting on the number of overnight trips taken in the last twelve months during which they had stayed in a hotel, participants took a mean of 4.8 leisure trips and 3.1 business trips. 10% of the community are “super travelers” taking 10 or more trips per year, and 60% of respondents took 3 or more leisure trips during the year

### Types of Overnight Leisure Trips

The following question is just for your leisure trips indicated above (not business trips) where you spent at least one night in a hotel. The total number of trips below should equal the total number of leisure trips above. Let's explore the concept of local/regional staycations vs. vacations further away from home. How many of these leisure trips were... (Overnight leisure trips in last 12 months that involved:)

	0	1	2	3	4	5	6	7	8	9	10+	Mean
Longer flights (2 hours or more)	<b>30.6%</b>	22.7%	19.2%	10.1%	7.3%	3.3%	2.3%	.8%	1.1%	.3%	2.4%	2.913
Drive vacations of more than 2 hours	<b>32.9%</b>	23.5%	18.0%	9.4%	6.3%	2.9%	2.4%	.8%	0.7%	.4%	2.7%	2.838
Drive vacations in your region of less than 2 hours	<b>55.9%</b>	17.2%	11.5%	5.6%	3.0%	1.5%	1.5%	.7%	0.5%	.2%	2.5%	2.204
Short Flights (less than 2 hours)	<b>59.4%</b>	18.7%	11.7%	3.6%	2.3%	1.2%	0.8%	.2%	0.3%	.2%	1.5%	1.938
In your own city, staying at a hotel (very short drive or public transport)	<b>85.5%</b>	7.8%	2.9%	0.9%	0.9%	0.6%	0.4%	.2%	0.0%	.0%	0.6%	1.337

Participants were more likely to report having taken overnight leisure trips where trips involved longer flights (69%) or drive vacations of more than two hours (67%) than when the trip was a drive vacation of less than two hours in one's own region (44%) or a trip involving a short flight (41%). Nearly 15% reported taking a leisure trip with an overnight stay in their own city.

### ***Number of Nights in Hotels, and in Luxury Hotels***

*Again, considering both business and leisure travel:*





	0	1-5	6-10	11-15	16-20	21-30	31-40	41-50	50+
How many nights did you spend in a hotel in the past 12 months?	9.0%	<b>24.5%</b>	20.8%	15.1%	10.9%	9.0%	4.4%	2.0%	4.3%
How many of these nights were in a "luxury class" hotel?	<b>48.4%</b>	27.4%	11.1%	5.5%	3.2%	2.2%	1.1%	0.4%	0.8%
<b>Total</b>	<b>28.1%</b>	<b>25.9%</b>	<b>16.1%</b>	<b>10.4%</b>	<b>7.2%</b>	<b>5.7%</b>	<b>2.8%</b>	<b>1.2%</b>	<b>2.6%</b>

Of the 81% of participants who said they had stayed a night or more in a hotel in the past 12 months, almost half (46%) reported spending more than 10 nights in a hotel.

## Travel Expressing LGBT Preferences

### ***Business Travel Decisions Influenced by LGBT Preferences***

*If you travel for business, are your business travel decisions influenced by your LGBT preferences as an individual? For example, do you purchase gay-friendly hotels or airlines when making business travel plans? (Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
<b>Sometimes, whenever possible</b>		<b>41.6%</b>	<b>1739</b>
No		31.0%	1297
Yes		17.2%	719
Rarely		10.3%	429
Not Answered			542
		<b>Valid Responses</b>	<b>4184</b>
		<b>Total Responses</b>	<b>4726</b>

More than half of respondents (59%) indicated that their business travel decisions were (17%) or sometimes were (42%) influenced by their preferences and loyalties as an LGBT consumer.

### ***Cruises and LGBT Charter Cruises***

*Let's explore how much you cruised:*

	0	1	2	3+
How many cruises in total did you take in the past 12 months?	<b>83.2%</b>	12.2%	3.4%	1.2%
How many of those cruises were LGBT Charter Cruises (like Atlantis or Olivia)?	<b>93.7%</b>	5.1%	1.0%	0.3%
<b>Total</b>	<b>88.3%</b>	<b>8.8%</b>	<b>2.2%</b>	<b>0.7%</b>

About 17% indicated that they had taken a cruise in the past 12 months. Although this is a relatively small percentage of the full sample, and a bit smaller than in previous years, this figure is still multiples higher than among the mainstream. Of those who said they had taken cruises, 6% reported taking LGBT Charter Cruises (like Atlantis or Olivia).

### Tours and LGBT Tours



*About your group travel:*

	0	1	2	3+
How many group tours in total did you take in the past 12 months (small group of people in one packaged tour)?	<b>86.3%</b>	9.6%	2.6%	1.5%
How many of those tours were LGBT oriented (mostly LGBT people traveling together)?	<b>92.4%</b>	5.5%	1.3%	0.8%

Nearly 14% of respondents said they had taken group tours in the past 12 months. Roughly half of those were in LGBT groups.

### ***Used Services of a Local Retail Travel Agent***


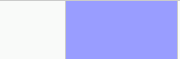





*Have you used the services of a local, retail travel agent in the past 12 months? (Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
<b>No</b>		<b>85.9%</b>	<b>4061</b>
Yes		14.1%	665
		<b>Valid Responses</b>	<b>4726</b>
		<b>Total Responses</b>	<b>4726</b>

About 14% of respondents said they had used the services of a local retail travel agent in the past 12 months. This figure continues to decline since it's peak in the early 90's, but many retail agents have answered this trend with specific offerings that their LGBT clients can't get via Internet channels (e.g. small groups on cruises, dedication to specific destinations or activities, etc.). See following question.

### ***Type of Travel That Travel Agent Was Used For***

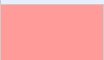










*For which types of travel did you use the local, retail travel agent (mark all that apply)? (Respondents were allowed to choose **multiple** responses)*

<b>Response</b>	<b>Chart</b>	<b>Frequency</b>	<b>Count</b>
<b>Unfamiliar destinations</b>		<b>30.8%</b>	<b>209</b>
Complicated itineraries		29.0%	197
Other, specify:		21.9%	149
Mainstream cruise		21.1%	143
LGBT group cruise		13.0%	88
Mainstream group tour		8.4%	57
LGBT group tour		8.2%	56
		<b>Valid Responses</b>	<b>679</b>
		<b>Total Responses</b>	<b>679</b>

Those who said they had used a local travel agent were especially likely to report asking the travel agent for assistance with unfamiliar destinations (31%) or complicated itineraries (29%). Some also indicated requesting help arranging mainstream cruises (21%) or LGBT group cruises (13%). About 8% each of respondents said they had turned to a travel agent to find out about a mainstream group tour or LGBT group tour.

### Travel for LGBT Events

*In the past 12 months, have you traveled to another city (requiring an overnight stay) to attend any of the following? Please mark all that apply. (Respondents were allowed to choose multiple responses)*

Response	Chart	Frequency	Count
<b>LGBT Pride event</b>		<b>23.3%</b>	<b>1100</b>
LGBT cultural, arts, or film event		10.0%	472
An LGBT circuit / dance event		6.0%	283
An event in the bear community		5.6%	266
An event for lesbians		5.6%	263
LGBT professional association		5.1%	240
An event in the leather community		4.9%	230
An event for LGBT families		3.0%	140
LGBT sports event or tournament		2.8%	133
An event for the transgender community		0.8%	40
An event for the bisexual community		0.6%	29
		<b>Valid Responses</b>	<b>4726</b>
		<b>Total Responses</b>	<b>4726</b>

Of various LGBT events, the one that was reportedly most likely to inspire an overnight trip to another city was a Pride event (23%), which has retained its position and strength over the past several years.

## General Motivations For Travel

### *Motivations for Taking a Vacation*

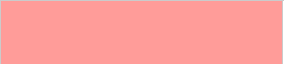











*What are your motivations when deciding where to take a vacation? Please select your top five.  
(Respondents were allowed to choose **multiple** responses)*

Response	Chart	Frequency	Count
<b>Rest and relaxation</b>		<b>68.8%</b>	<b>3251</b>
Explore new destinations		62.9%	2974
Need a break from routine		51.5%	2433
Return to favorite destinations		50.1%	2370
Art, architecture, culture, music, etc.		41.8%	1976
Romance with partner		36.7%	1735
The destination's gay/lesbian bars, clubs, parties, etc.		25.6%	1211
Food & Wine		21.0%	991
Sexual adventure		14.1%	666
Check destination off my list		13.5%	640
Shopping		13.0%	616
Other, please specify:		12.1%	574
Make new friends with people living in the destination		9.5%	449
Make new friends with other travelers and tourists		8.6%	407
Health and fitness (i.e. active vacation)		8.1%	383
		<b>Valid Responses</b>	<b>4726</b>
		<b>Total Responses</b>	<b>4726</b>

In deciding where to vacation, participants said they were especially motivated by rest and relaxation (69%), to explore new locations (63%), to take a break from daily routines (52%) or to return to favorite destinations (50%). 42% wanted to explore cultural attractions such as art, architecture, culture, or music. Others chose locations based on wanting a romantic trip with a partner (37%), or interest in a destination's gay/lesbian bars, clubs, and parties (26%) or food and wine (21%).

## Resources That Influence Selecting a Destination

*Motivators for Destination Selection: We want to understand which resources motivate you to visit a city or country. When choosing a destination to visit, what are the top motivators that make you choose one destination over another? Choose your top five. (Respondents were allowed to choose **multiple** responses)*

Response	Chart	Frequency	Count
<b>Word of mouth from friends</b>		<b>72.1%</b>	<b>3407</b>
Articles in LGBT publications		47.5%	2245
Articles in mainstream publications		35.7%	1688
Traveler reviews on travel websites and blogs		34.8%	1644
Articles on LGBT websites		31.9%	1508
Display ads in LGBT publications		26.4%	1250
Articles on mainstream websites		23.9%	1131
Tourism bureau having an LGBT-specific website		21.1%	999
Banner ads on LGBT websites		15.4%	728
Display ads in mainstream publications		13.2%	623
Email newsletter broadcasts for LGBT community		12.8%	605
Banner ads on mainstream websites		6.7%	318
		<b>Valid Responses</b>	<b>4726</b>
		<b>Total Responses</b>	<b>4726</b>

Respondents reported being especially likely to choose a travel destination based on word of mouth from friends (72%). Many said they would be influenced by articles in LGBT publications (48%) or mainstream publications (36%), or by travel reviews on travel websites or blogs (35%) or articles on LGBT websites (32%). About one-quarter (26%) of respondents thought they would be motivated by display ads in LGBT publications.

### ***Motivations for Choosing a Hotel***

*When making a hotel reservation for leisure travel, what are the top motivators influencing you choose one hotel over another?*

	1 - Does not motivate	2	3 - Somewhat motivating	4	5 - Very Motivating	Mean
Price	2.1%	2.5%	15.3%	28.0%	<b>52.2%</b>	4.258
Hotel's location near tourist attractions	4.9%	6.8%	26.6%	<b>36.4%</b>	25.2%	3.704
Review of property on Internet	6.0%	6.9%	27.9%	<b>34.5%</b>	24.7%	3.649
Referral from friend	6.8%	8.1%	27.0%	<b>33.3%</b>	24.8%	3.613
Hotel brand reputation as LGBT-friendly	8.7%	8.3%	<b>30.0%</b>	29.2%	23.9%	3.514
Free Internet access	16.0%	11.2%	<b>25.0%</b>	23.2%	24.7%	3.294
Hotel's location near LGBT neighborhood	13.7%	13.1%	<b>31.2%</b>	24.4%	17.6%	3.192
Hotel advertising in LGBT print and/or Internet media.	13.6%	14.4%	<b>35.8%</b>	23.1%	13.1%	3.078
Hotel brand's reputation as being more upscale	14.4%	15.3%	<b>32.6%</b>	24.5%	13.2%	3.070
Hotel brand's customer loyalty program/points	<b>25.6%</b>	16.5%	<b>25.6%</b>	17.4%	14.8%	2.792
Hotel's affiliation or rating with organizations like IGLTA, TAG or HRC	26.2%	18.0%	<b>31.2%</b>	15.9%	8.7%	2.630
Availability of hotel gym	<b>40.9%</b>	20.5%	21.7%	10.9%	6.0%	2.205
<b>Total</b>	<b>14.9%</b>	<b>11.8%</b>	<b>27.5%</b>	<b>25.1%</b>	<b>20.8%</b>	N/A

In considering which hotel they would select when making a hotel reservation for leisure travel, over half (52%) of respondents said they would consider the price of the hotel very motivating. About one-third of participants also thought they would be relatively highly motivated by the hotel's location near tourist attractions (36%) or a review on the Internet (35%).

<b>Favorite American And Canadian City Travel Destinations</b>
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***Primary Activities in Visiting Any City***



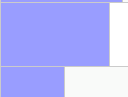
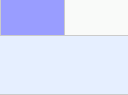
*When traveling to a city, how likely are you to participate in the following activities?*

	Not likely	Somewhat likely	Very likely	Mean
Go to the gay neighborhood	6.7%	35.0%	<b>58.4%</b>	2.517
Go to a neighborhood restaurant	1.4%	27.2%	<b>71.4%</b>	2.700
Visit the popular mainstream tourist attractions	6.6%	44.5%	<b>48.8%</b>	2.422
Go to a museum	10.1%	43.8%	<b>46.1%</b>	2.360
Go to a gay bar or nightclub	14.1%	37.3%	<b>48.6%</b>	2.345
Go shopping in city's retail district	11.6%	<b>44.5%</b>	44.0%	2.324
Go on a day trip outside the city	17.5%	<b>52.2%</b>	30.4%	2.129
Go to a concert or play	20.0%	<b>49.9%</b>	30.1%	2.101
Go to a medium to upper scale chain restaurant.	22.4%	<b>46.6%</b>	30.9%	2.085
Go to an expensive / high end restaurant	30.2%	<b>40.2%</b>	29.6%	1.994
Take a city tour	29.6%	<b>46.9%</b>	23.5%	1.938
Go to a gym while on vacation	<b>60.0%</b>	27.1%	12.9%	1.528
Rent a bike/canoe/kayak	<b>60.4%</b>	30.5%	9.0%	1.486
Go to a straight bar or nightclub	<b>62.4%</b>	30.0%	7.6%	1.452
<b>Total</b>	<b>25.2%</b>	<b>39.7%</b>	<b>35.1%</b>	N/A

When they thought about activities they were likely to participate in while visiting a city, the majority of respondents strongly agreed that they were very likely to go to a neighborhood restaurant (71%) or to the city's gay neighborhood (58%). Almost half also strongly agreed that they would visit popular mainstream tourist attractions (49%), go to a museum (46%), or go to a gay bar or nightclub (49%). Between 40% and about 50% also said they would be somewhat likely to go on a day trip outside a city (52%), go to a concert or play (50%), take a city tour (47%), go shopping in the city's retail district (45%), or eat at a medium- to upper-scale chain restaurant (47%) or high-end restaurant (40%).

### ***Passport Used In the Past 12 Months***

*Did you use your passport in the past 12 months? Mark all that apply. (Respondents were allowed to choose **multiple** responses)*

<b>Response</b>	<b>Chart</b>	<b>Frequency</b>	<b>Count</b>
<b>Yes, for travel to Canada, Mexico or the Caribbean</b>		<b>34.3%</b>	<b>1620</b>
I have a passport, but I did not use it in the past 12 months		32.1%	1517
Yes, for travel to other international destinations		28.4%	1343
I DO NOT HAVE A PASSPORT		17.0%	802
		<b>Valid Responses</b>	<b>4726</b>
		<b>Total Responses</b>	<b>4726</b>

83% of LGBT consumers surveyed in this study hold a valid passport, far higher than the US average (according to an article in *The Economist*) of 34% of Americans age 18 and older.

63% indicated that they used their passport in the past 12 months for some type of international travel.

As for travel outside the U.S., a somewhat greater percentage (34%) of participants said they had used their passports for travel to Canada, Mexico or the Caribbean in the past 12 months than for travel to other international destinations (28%).

## Places, Hotels and Airlines With Best Promotions to the LGBT Community

**Question #1:** *Over the past year, which city, resort town, state or country has done the best job promoting themselves to the LGBT community? Base your answer on the destination's LGBT advertising, outreach and communications. Please write only one destination. (**Destination:**) (Respondents were limited to brief text responses).*

Of the total sample, 3,800 responded to this question. The top destinations indicated were:

Las Vegas: 11%  
San Francisco: 10%  
Fort Lauderdale: 7%  
Philadelphia: 6%  
Provincetown: 5%  
London: 5%

**Question#2:** *Over the past year which hotel brand has done the best job promoting themselves to the LGBT community? Base your answer on the hotel's LGBT advertising, outreach and communications. Please write only one hotel brand name. (**Hotel Brand:**) (Respondents were limited to brief text responses)*

Of the total sample, 2,800 responded to this question. The top hotel brands indicated were:

W Hotels: 11%  
Kimpton Hotels: 11%  
Hilton: 9%  
Hyatt: 8%  
Marriott: 7%

**Question #3:** *Over the past year which airline has done the best job promoting themselves to the LGBT community? Base your answer on the airline's LGBT advertising, outreach and communications. Please write only one airline. (**Airline:**) (Respondents were limited to brief text responses)*

Of the total sample, 3,287 responded to this question. The top airlines indicated were:

American Airlines: 38%  
Southwest: 15%  
Delta: 11%  
Virgin: 3%

<b>U.S. and World Travel: Vacation, Business, and Future Travel</b>
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### ***U.S. West of the Mississippi***

*This is the final question, but it takes a little time to complete if you travel a lot. 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. By "visit," we mean you traveled to the destination and spent at least one paid night in a hotel/ guest house/condo rental (i.e. you paid for your overnight accommodations—not stayed with friends). If you live in the destination, please **DO NOT CHECK** the destination. Also tell us if you plan to visit any of these destinations over the next 12 months.*

	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
Las Vegas, NV	20.5%	6.0%	22.0%
San Francisco, CA	19.7%	8.0%	25.0%
Los Angeles/West Hollywood, CA	16.9%	7.0%	18.0%
Palm Springs, CA	10.9%	1.0%	15.0%
San Diego, CA	10.1%	5.0%	13.0%
Seattle, WA	9.0%	5.0%	13.0%
Napa County, CA	8.0%	1.0%	9.0%
Sonoma County, CA / Russian River	7.9%	1.0%	9.0%
New Orleans, LA	7.1%	3.0%	14.0%
Hawaii	6.7%	1.0%	15.0%
Phoenix/Tempe/Scottsdale, AZ	6.4%	4.0%	9.0%
Denver, CO	6.1%	5.0%	8.0%
Dallas, TX	5.9%	5.0%	7.0%
Portland, OR	5.7%	3.0%	10.0%
Austin, TX	5.0%	3.0%	7.0%

Finally, participants were also asked about places inside and outside the United States that they had visited for a vacation or business in the past year, as well as about which places they hoped to visit in the year ahead. Of destinations west of the Mississippi River, Las Vegas, San Francisco, and L.A. were the three destinations that the greatest percentage of respondents reported having visited in the past year for vacation (respectively 21%, 20%, and 17%) or for business (respectively 6%, 8%, and 7%), as well as being the locations respondents most hoped to visit in the next year (respectively 22%, 25%, and 18%).

Of the top 10 Western U.S. locations reported as past-year vacation sites by the greatest percentage of respondents, California locations comprised 6 of these sites, including San Diego, Palm Springs, and wine-district Napa County and Sonoma County/Russian River. Other top-10 past-year vacation locations outside California included Seattle (9%), New Orleans and Hawaii (7% each).

### *U.S. East of the Mississippi*

	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
New York City, N.Y.	23.0%	9.0%	27.0%
Chicago, IL	15.8%	9.0%	19.0%
Washington, DC	14.7%	9.0%	18.0%
Ft. Lauderdale/Wilton Manors, FL	14.4%	3.0%	14.0%
Orlando, FL	10.0%	4.0%	11.0%
Miami/ South Beach, FL	9.1%	3.0%	12.0%
Boston, MA	8.6%	5.0%	12.0%
Provincetown, MA	8.3%	0.0%	14.0%
Philadelphia, PA	8.3%	4.0%	10.0%
Atlanta, GA	6.8%	5.0%	9.0%
Key West, FL	6.5%	0.0%	12.0%
Tampa/St. Petersburg, FL	6.0%	2.0%	7.0%
Baltimore, MD	5.4%	3.0%	5.0%
Rehoboth Beach, DE	4.5%	0.0%	6.0%
Atlantic City, NJ	4.4%	1.0%	5.0%
Maine / Portland ME	4.3%	1.0%	5.0%
Minneapolis/St. Paul, MN	4.1%	3.0%	5.0%
Cleveland, OH	3.5%	2.0%	4.0%
Detroit, MI	3.0%	2.0%	3.0%
Raleigh/Durham/Chapel Hill, NC	3.0%	2.0%	3.0%
Providence RI	2.9%	1.0%	4.0%
Fire Island, N.Y.	2.8%	0.0%	5.0%

As for cities east of the Mississippi, participants were most likely to report past-year vacation travel to New York (23%), Chicago (16%) or Washington, D.C. (15%), as well as past-year business travel to these locations (each 9%); they were also especially likely to want to visit these locations in the next year (respectively, 27%, 19% and 18%).

Of the top 6 vacation locations east of the Mississippi that the greatest percentage of participants reported visiting, 3 were in Florida, with past-year vacation travel reported to Fort Lauderdale/Wilton Manors (14%), Orlando (10%) or Miami/South Beach (9%), and next year travel to these locations also respectively anticipated by 14%, 11% and 12% of participants; another 12% of respondents hoped to visit Key West as well. The #7 and #8 vacation locations reported in the past year—Boston (9%) and Provincetown, MA. (8%)—were also locations that 12% and 14% of respondents respectively hoped to visit in the next year. As for cities that respondents reported visiting relatively often for business, these included not only N.Y., Chicago and Washington D.C. but also Boston and Atlanta (each 5%).

### *Canada*

	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
Toronto	6.4%	2.3%	12.9%
Montreal	6.1%	1.4%	12.0%
Vancouver	5.4%	1.3%	10.4%
Victoria/Vancouver Island	2.6%		4.2%
Quebec City	1.3%		2.8%
Whistler	1.2%		2.3%
Halifax	0.9%		1.4%
Ottawa	0.7%		1.4%
Banff	0.7%		1.3%
Calgary	0.7%		1.2%
Winnipeg	0.3%		0.7%
Whitehorse/Dawson City, Yukon	0.3%		0.4%

Of Canadian cities, Toronto, Montreal and Vancouver were the cities reportedly visited by the greatest percentage of participants for past-year vacation travel (respectively 6%, 6% and 5%) or business (respectively 2%, 1% and 1%), as well as being the Canadian cities participants most hoped to visit in the next year (respectively 13%, 12% and 10%).

### **Mexico/Caribbean**

*(Non-cruise, where you stayed one night in a hotel)*

	Vacation travel, past 12 months	Plan to visit next 12 months for any reason
Puerto Vallarta, Mexico	5.9%	8.3%
Other Mexican Destination	5.2%	6.3%
Cancun, Mexico	3.6%	3.9%
Mexico City, Mexico	1.5%	2.0%
Other Caribbean Island	5.8%	7.3%
Puerto Rico	3.7%	5.3%
US Virgin Islands	2.4%	3.1%
British Virgin Islands	1.3%	1.8%
Curacao	0.9%	1.6%
Cuba	0.2%	1.3%

Participants also indicated any past-year or hoped-for travel to Mexico or Caribbean. The most popular Mexican vacation destinations included Puerto Vallarta (6%), another Mexican destination (5%), or Cancun (4%), with these being preferred travel destinations for the next year as well (respectively 8%, 6% and 4%). As for Caribbean vacation locations, Puerto Rico (4%) or another Caribbean island (6%) were the preferred destinations in the past year, with 1% also indicating past-year business travel to Puerto Rico. In the next year, 7% and 5% of participants respectively hoped to visit another Caribbean island or Puerto Rico.

### ***Central and South America***

	Vacation travel, past 12 months	Plan to visit next 12 months for any reason
Costa Rica	2.0%	4.0%
Argentina	2.0%	3.4%
Other Central American Country	1.4%	2.5%
Brazil	1.1%	3.8%
Other South American Country	1.0%	1.8%
Peru	0.9%	1.7%
Chile	0.8%	1.6%
Ecuador	0.4%	1.1%
Venezuela	0.2%	0.7%

Compared to reports of travel to Mexico or the Caribbean, fewer participants said they had visited Central or South America for vacation in the past year, with 2% reporting vacations to Costa Rica or Argentina, and 1% vacations to Brazil, Peru, Chile, or another Central American or South American country. Not even 1% of participants reported business travel to Central American or South America in the past year. Between 3% and 4% of participants envisioned travelling to Costa Rica (4%), Brazil (4%), Argentina (3%) or another Central American country (3%) in the next year.

### *Europe – Top 15 Reported*

	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
England	7.3%	3.0%	12.0%
France	6.2%	2.0%	9.0%
Germany	4.8%	2.0%	7.0%
Italy	4.6%	1.0%	9.0%
Spain	3.9%	1.0%	7.0%
Netherlands (Holland)	3.2%	1.0%	5.0%
Greece	1.9%		4.0%
Ireland	1.8%	1.0%	4.0%
Denmark	1.8%		2.0%
Czech Republic	1.5%		3.0%
Austria	1.5%		2.0%
Switzerland	1.4%	1.0%	2.0%
Belgium	1.4%		2.0%
Sweden	1.4%		2.0%

The European countries that participants were most likely to report having visited in the past year included England (7%), France (6%), Germany (5%), Italy (5%), and Spain (4%), with these countries also being those that the greatest percentage of participants—7% to 12%—reported wanting to visit in the next 12 months. Additionally 3% of respondents reported business travel to England and 2% each business travel to France or Germany in the past year.

### ***Africa***

	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
Egypt	1.1%	0.1%	1.5%
South Africa	0.7%	0.4%	2.2%
Morocco	0.6%	0.1%	1.2%
Other African Country	0.5%	0.3%	1.2%
Kenya	0.2%	0.1%	0.7%

Only a small percentage of respondents reported visiting Africa for a vacation in the past year; 1% each of participants reporting having visited Egypt or South Africa in the past year; and 2% hoped to visit either of these two countries in the next year.

### ***Middle East and Asia***

	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
Thailand	1.9%	0.3%	2.9%
China (Hong Kong)	1.3%	0.9%	2.5%
Japan	1.1%	0.7%	2.0%
Other Asian Country	1.0%	0.4%	1.8%
Singapore	0.9%	0.4%	1.6%
China (Mainland)	0.8%	0.6%	1.9%
Vietnam	0.7%	0.1%	1.2%
Israel	0.6%	0.3%	1.9%
India	0.4%	0.4%	1.6%
Indonesia	0.4%	0.1%	1.0%
Malaysia	0.4%	0.2%	0.7%
Dubai	0.3%	0.4%	0.9%
Nepal	0.1%	0.0%	0.4%

With regard to Asian countries, participants were most likely to say that in the past year they had taken vacations to such Southeast Asian or Far Eastern countries as Thailand (2%), Hong Kong (1%), Japan (1%), Singapore (1%), Mainland China (1%) or Vietnam (1%). They were somewhat less likely to report having visited Middle Eastern countries such as Israel or Dubai, or Central Asian countries such as India or Nepal. About 1% each of participants also said they had taken past-year business trips to Hong Kong, Japan or Mainland China. As for travel in the next 12 months, participants thought they would be most likely to go to Thailand or Hong Kong (each 3%), or Japan, Mainland China, Israel, or India (each 2%).

### ***South Pacific***






















	Vacation travel, past 12 months	Business travel, past 12 months	Plan to visit next 12 months for any reason
Australia	1.7%	0.6%	5.8%
New Zealand	0.7%	0.2%	3.7%
Tahiti	0.6%	0.1%	1.4%
Other South Pacific Country	0.4%	0.2%	1.2%

Additionally, few participants reported taking a past-year vacation to Australia (2%) or New Zealand (1%), but 6% and 4% respectively reported hoping to visit these two countries in the next 12 months.

## Demographics

### *State of Residence*

*Please select the state in which you live. (Respondents could only choose a **single** response)*

Response	Chart	Frequency	Count
<b>California</b>		<b>15.6%</b>	<b>733</b>
New York		7.8%	366
Florida		6.6%	308
Texas		6.5%	303
Illinois		4.9%	231
Pennsylvania		4.2%	199
Ohio		3.5%	163
Massachusetts		3.4%	162
Georgia		3.2%	151
Colorado		3.2%	150
Washington		3.0%	140
New Jersey		2.8%	131
Virginia		2.5%	116
North Carolina		2.3%	109
Michigan		2.3%	107
Arizona		2.3%	106
Maryland		1.9%	89
Oregon		1.7%	81
District of Columbia		1.7%	78
Wisconsin		1.6%	75
Minnesota		1.6%	74







Missouri		1.5%	71
Indiana		1.4%	67
Nevada		1.4%	67
Tennessee		1.4%	67
Connecticut		1.0%	49
Alaska		0.8%	39
New Mexico		0.8%	36
Kentucky		0.7%	34
Oklahoma		0.7%	33
Kansas		0.6%	30
Hawaii		0.6%	29
Louisiana		0.6%	28
Utah		0.6%	28
Alabama		0.5%	24
Iowa		0.5%	24
Arkansas		0.5%	22
South Carolina		0.5%	22
New Hampshire		0.4%	20
Rhode Island		0.4%	19
Delaware		0.4%	18
Maine		0.4%	18
Nebraska		0.3%	15
Montana		0.3%	12
West Virginia		0.2%	11
Idaho		0.2%	10
Vermont		0.2%	8
Mississippi		0.1%	7

Wyoming		0.1%	6
South Dakota		0.1%	5
North Dakota		0.0%	2
Other US Territory or Possession		0.0%	2
Puerto Rico / USVI		0.0%	1
Not Answered			30
		<b>Valid Responses</b>	<b>4696</b>
		<b>Total Responses</b>	<b>4726</b>

The greatest percentages of participants reported living in California (16%), New York (8%), Florida (7%), Texas (7%) or Illinois (5%).

### ***Urban or Rural Living Environment***

*What type of environment best describes the place in which you live? (Respondents could only choose a **single** response)*

<b>Response</b>	<b>Chart</b>	<b>Frequency</b>	<b>Count</b>
<b>Urban / Big City</b>		<b>38.5%</b>	<b>1813</b>
Medium sized city		21.1%	996
Suburb		16.8%	792
Small city		10.4%	491
Small town		5.9%	280
Rural area		5.4%	255
Resort community		1.8%	84
Not Answered			15
		<b>Valid Responses</b>	<b>4711</b>
		<b>Total Responses</b>	<b>4726</b>

The majority (70%) of respondents reported living in cities, whether big cities (39%), medium-sized cities (21%) or small cities (10%).

## **ABOUT COMMUNITY MARKETING, INC.**

The facts are plain: gay men and lesbians travel more, spend more and have the largest amount of disposable income. Undaunted by events in the news, gay and lesbian travelers make up 10% of the travel industry—or more. Most critically, their travel dollars go to suppliers and destinations that recognize their unique buying preferences and offer them differentiated value.

Community Marketing, Inc. has been helping tourism industry leaders master the subtleties of this market since 1992. 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 gays and lesbians comprise a “slice” of the world’s population, you’ll find markets for singles, couples and families in every ethnicity. And you’ll find a world of diverse interests, from rodeo to golf to snowboarding, from outdoor adventure to mega-parties to theatre. 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 gay tourism marketing. Through the company’s tireless efforts since 1992, “doors have opened” around the world for gay and lesbian travelers. We have helped grow gay market recognition through research, media relations and education; and have brought marketing opportunities to the world’s leading gay-welcoming destinations, hotels and travel suppliers. Besides its rapidly growing LGBT Market Research + Development Lab® practice, we produce the “International Conference on Gay & Lesbian Tourism,” now in its 11<sup>th</sup> year, and regional “Best Practices in Gay & Lesbian Tourism” seminars. We also developed and operate the TAG Approved® Accommodations program and the GLCVB (Gay & Lesbian Convention & Visitors Bureau), and publish the *Annual Gay & Lesbian Travel Industry Directory*. As we look forward, we see our partnership with suppliers, hospitality leaders, government Tourism Offices, Convention & Visitors Bureaus and Destination Marketing Organizations continuing to grow, ultimately helping to create a more welcoming “gay-friendly” environment for gay and lesbian travelers worldwide.

### **CMi’s LGBT Market Research + Development Lab® clients include:**

Greater Philadelphia Tourism Marketing Corporation  
Las Vegas Convention & Visitors Authority  
Dallas Convention & Visitors Bureau  
Fort Lauderdale Convention & Visitors Bureau  
San Francisco Convention & Visitors Bureau  
Tempe Convention & Visitors Bureau  
NYC & Co.  
Baltimore Convention & Visitors Bureau  
Palm Springs Bureau of Tourism  
LA, Inc. (Los Angeles CVB)  
Canadian Tourism Commission  
Switzerland Tourism  
Japan National Tourism Organization  
Japan Travel Bureau  
Travelocity.com LP  
Kimpton Hotels & Restaurants  
Hyatt Hotels & Resorts  
Marriott Hotels  
Starwood Hotels & Resorts  
*And many others!*



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- Switzerland Tourism
- Japan National Tourism Organization
- Japan Travel Bureau
- Travelocity.com LP
- Kimpton Hotels & Restaurants
- Hyatt Hotels & Resorts
- Marriott Hotels
- Starwood Hotels & Resorts
- And many others!*

# 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 methodologies and experience are distinct from those of others when considering approaches, survey respondent sources—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 15+ 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, and email broadcasts 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*, 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 academic approach, attempting to "represent the gay community at large," may be appropriate for some studies. But we feel that for marketers desiring valid consumer insights about products, services, advertising creative and marketing strategies, this methodology it is not likely to represent LGBT community members who are reading 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. 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 40,000 qualified LGBT consumers, the largest of its kind, by far. Our recent LGBT Consumer Index® study resulted in over 25,000 completed surveys, with nearly a 50-50 male to female ratio, 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 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 variety of interests, sensitivities, preferences and priorities. Those, plus variations in geographical location, age, income, relationship status, gender, sexual 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**

CMI takes 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 and Britain, as well as several 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 develops and facilitates LGBT focus groups and other *qualitative* research options. We have produced and reported on focus groups covering a wide variety of topics, plus we have run advisory board series, multi-year customer satisfaction survey projects and field studies which can round out a comprehensive market intelligence plan.

*Running only online surveys, other research companies are telling half of the story. 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 averages 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 representatives 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 over 15 years.*

## **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 a National Gay & Lesbian Chamber of Commerce-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, Commercial Closet, 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 research than for studies from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 50+ 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 15 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.