

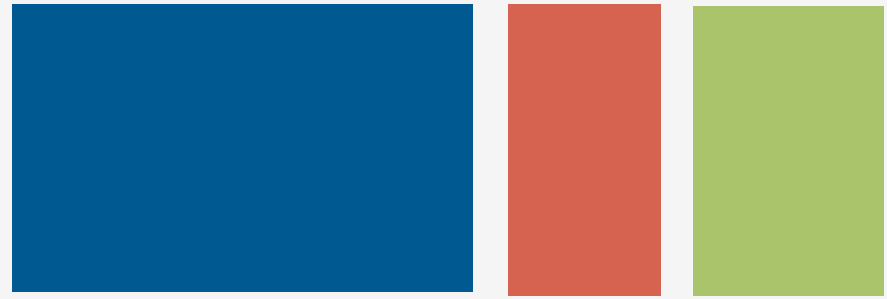
# CMI's 21st Annual Survey on LGBT Tourism & Hospitality

U.S. Overview Report  
December 2016

*Sponsored by:*



*In partnership with:*



# ABOUT US

## 25 YEARS OF LGBT INSIGHTS



- › Community Marketing & Insights (CMI) has been conducting LGBT consumer research for 25 years. Our practice includes online surveys, telephone interviews, intercepts, focus groups (on-site and online), and advisory boards in North America and Europe. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, measurable marketing planning and assessment of return on investment.
- › Key findings have been published in the New York Times, Washington Post, Chicago Tribune, Los Angeles Times, Wall Street Journal, Forbes, USA Today, Chicago Tribune, Miami Herald, CBS News, CNN, NPR, Associated Press, eMarketer, Mashable and many other international, national and regional media.
- › CMI's research clients include leaders from a wide range of industries. In the past few years, studies have been produced for these and many other clients: Argentina Tourism Office, VISIT FLORIDA, Greater Fort Lauderdale CVB, Visit Orlando, Hawaii Tourism Authority, Las Vegas CVA, Visit Philadelphia, Travel Portland, NYC & Company, Empire State Development Corp., Choose Chicago, Visit Dallas, Visit Houston, Tourism Toronto, Starwood, Hyatt, Aqua-Aston Hotels, Hawaiian Air Lines, Prudential, Wells Fargo, Aetna, Target Brands, Hallmark, iHeartMedia, DirecTV, Viacom, Johnson & Johnson, WNBA, American Cancer Society, Planned Parenthood, Kaiser Family Foundation, U. S. Census, and many other corporations and organizations across North America and around the world.



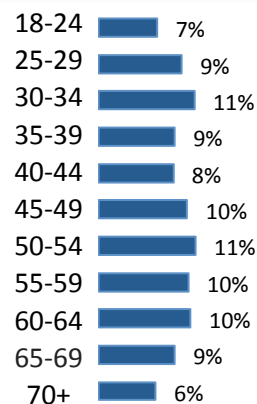
# RESEARCH DESIGN

## *25 YEARS OF LGBT INSIGHTS*

- › 4,731 total respondents completed the 10-minute online survey conducted from November 17, 2016 to December 5, of 2016.
- › This report focuses on United States data for 3,723 self-identified members of the LGBT community. Weighted data focuses on 3,545 participants born between 1946 and 1998, with a male, female or transgender/genderqueer identity.
- › 83% of participants came from a random sample of the Community Marketing & Insights (CMI) LGBT research panel. The panel has been built over a 25 year period with the partnership of over 300 LGBT media, organizations and events around the world.
- › 17% of the participants were recruited from an email distribution from one of the following LGBT travel media or organizations, IGLTA, Passport Magazine, MOOVZ, or OutTraveler.com
- › As an incentive, respondents were entered into a drawing for one of twenty \$50 cash or gift certificate prizes.
- › For the purposes of this report, weighted results were calculated with the following assumptions: Millennial 33%, Generation X 33%, Baby Boomer 33%, gay and bisexual men 47.5%, lesbian and bisexual women 47.5%, transgender 5%. The results are meant to provide a reasonably balanced opinion of LGBT community members who are “out” and interacting with LGBT media and events.

## U.S. Respondent Profile

### Age



### Identity

Multiple identities were permitted.

Gay and Bisexual Men	62%
Lesbian or Gay Woman	32%
Transgender, Gender Fluid And Genderqueer	5%
Other Identity	1%

### State of Residence

Participation from all 50 states.  
Top five states by percentage.

California	16%
Texas	6%
Florida	7%
New York	8%
Illinois	7%

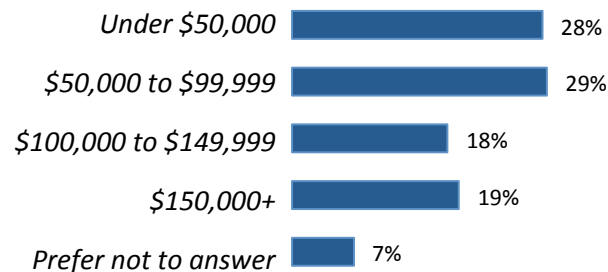
### Relationship Status

Multiple responses were permitted.

Single	41%
Married	32%
In a committed relationship and living with partner	17%
Engaged to be married	3%
Civil union or domestic partner	2%

Other Single: Divorced (2%), Widow/Widower (2%), and Other (1%)

### Household Income



Base: All LGBT USA n=3,723 Findings are presented by gender or generation when differences are noted.

21st Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2016

# LGBT TRAVEL IN 2016

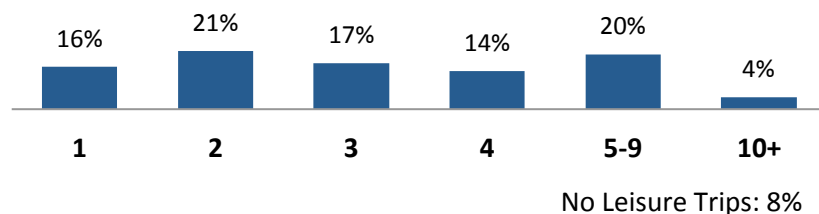


**LGBT TRAVEL:** Comparing results to the 2015 report, 2016 LGBT leisure travel increased by 2%.

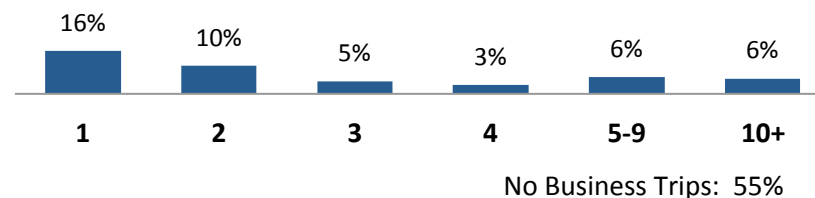
### PAST 12 MONTH TRAVEL



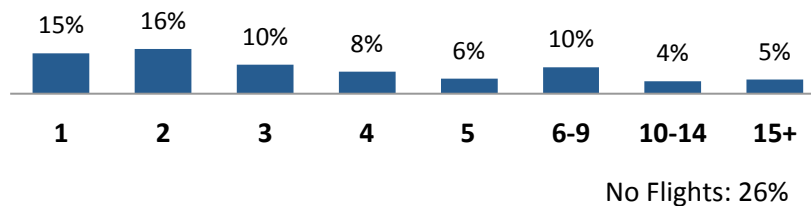
#### Leisure/Vacation/Holiday Travel TRIPS TAKEN



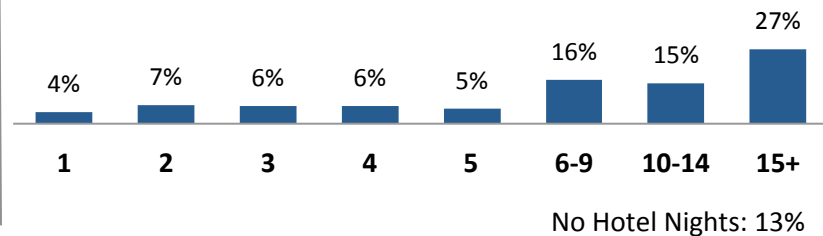
#### Business Travel TRIPS TAKEN



#### Number of Flights for Leisure ROUND TRIP FLIGHTS TAKEN



#### Hotel Nights for Leisure HOTEL NIGHTS PURCHASED



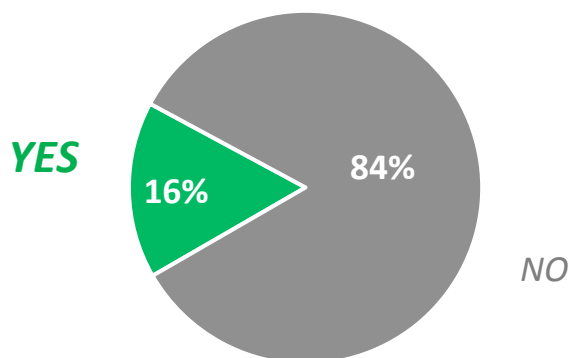
Bases: Weighted All USA LGBTs n=3,723

**MARRIAGE & HONEYMOONS:** Of the 1,185 study participants indicating that they are married, 16% said that they were married in the past year (this is down from 21% indicating marriage in past year in the 2015 report). CMI would expect a reduction of same-sex marriages per year as we get further from the Supreme Court decision of June 2015. In the 2016 survey, we had 1,366 gay men or lesbians in a relationship of 5 years or more and living with a partner. Of those, 67% were already married, 3% engaged to be married, and 4% in legal civil unions and domestic partnerships. This indicates that a high percentage of long-term same-sex couples have already been married over the 12 years in which marriage has been available in an increasing number of U.S. states. About half of the participants married in the past year indicated that they went on a honeymoon. The survey also asked recently married couples where they went on their honeymoon. The total number was too small for analysis, except that there was a high percentage indicating warm weather destinations across the world.

### MARRIAGE & HONEYMOONS

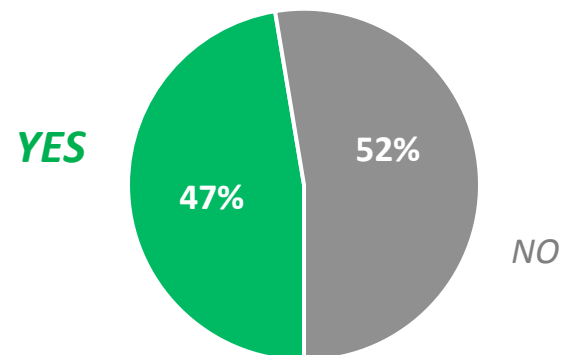
{ Did you get married in the past year? }

AMONG PARTICIPANTS INDICATING MARRIED



{ Did you go on a honeymoon after your marriage? }

AMONG THOSE MARRIED IN THE PAST YEAR



Base: All LGBT N=1,185 Participants indicating they are married; ALL LGBT Married in the Past Year n=192

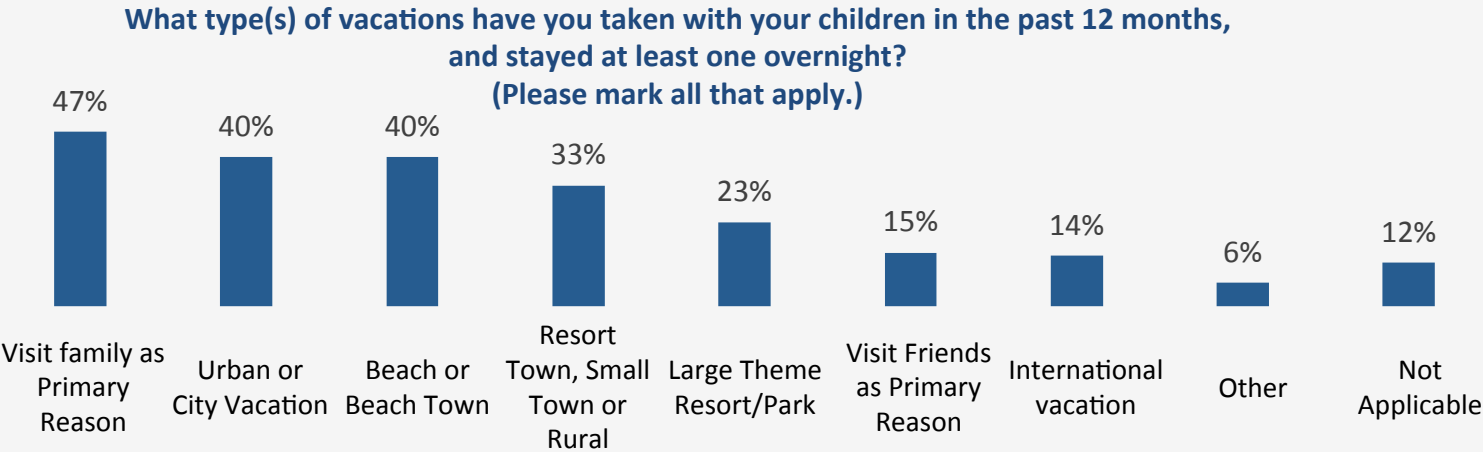


**LGBT FAMILY TRAVEL:** LGBT parents are most heavily concentrated among Generation X women and Millennial women. Generation X men have the highest parent percentages among the gay and bisexual men. There are many types of destinations attractive to LGBT parents for family vacations.

**Parents of Children Under 18 Living at Home Full Time or Part Time (N=198)**

*Explanation of graph: Percent distribution within overall parent group.  
40% of LGBT parents are Gen X female, not 40% of Gen X women are parents.*

	Millennials	Generation X	Baby Boomer
Lesbian and Bisexual Women	20% of total parents	40% of total parents	11% of total parents
Gay and Bisexual Men	5% of total parents	16% of total parents	8% of total parents



Base for destinations: LGBT Parents of a Child Under Age 18 at Home Full or Part-time n=220.  
Base for parent distribution did not include gender expansive parents because of low base.

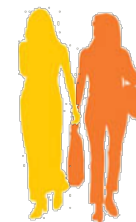


**RELATIONSHIPS AND REASONS FOR TRAVEL:** Notable is the high number of years that LGBT couples have been together (marriage or not). Many same-sex couples were together for years--if not decades--before marriage became available, a fact often overlooked by those looking at the "LGBT wedding market." By far, having fun and sharing new activities and experiences, as well as getting out of the rut at home, were the reasons that same-sex couples traveled together. "Romance" scored relatively poorly as a motivation to travel, especially among older couples.

### RELATIONSHIPS & TRAVEL

{ How long have you been with your partner or spouse? } *AMONG THOSE PARTNERED*

	Less than 1 year	1 to 4 years	5 to 9 years	10 or more years
<b>Men</b>	3%	25%	24%	48%
<b>Women</b>	2%	24%	25%	49%



{ Think back to the most recent time you traveled with your partner or spouse. What were you trying to achieve in the vacation with your partner or spouse? (Please mark all that apply.) }

	Men	Women	Millennials	Gen X	Boomers
Have fun and share new activities and experiences	86%	88%	88%	88%	84%
Get out of our rut at home	40%	32%	39%	37%	33%
Romance with partner	38%	42%	46%	43%	32%
Emotional connection with partner	30%	46%	46%	35%	33%
Meet new people	18%	9%	12%	13%	16%
Intellectual connection with partner	18%	19%	24%	16%	17%
None of the above	7%	5%	6%	5%	8%

Base: (Partnered) Gay & Bi Men n= 1,116; Lesbians and Bi Women n=663; Millennials n=413; Gen X n=626; Boomers n=740

**TYPE OF PRICE-POINT TRAVELER:** In general, LGBTs are firmly mid-range price point travelers. There are some generation and gender differences. Gay and bisexual men are slightly more likely to indicate a higher 5 or 4 rating. As expected, older generations spend more than younger generations. However, what is most striking is that across all demographics, few rated themselves as a 1 or 5.









In the past year, if you had to pick one, what type of price point traveler are you?

Type of Traveler	All LGBT	Gay & Bi Men	Lesbian & Bi Women	Millennials	Generation X	Baby Boomers
5 – Luxury traveler	4%	5%	3%	2%	4%	6%
4 - Moderate price traveler, with a little luxury	32%	36%	30%	21%	36%	40%
3 – Moderate price travel	26%	27%	25%	26%	27%	26%
2 - Budget traveler with an occasional splurge	29%	25%	33%	39%	27%	22%
1 - Budget / economy traveler	8%	7%	8%	12%	6%	6%

Base: (Weighted) Gay and Bi Men n=2,215; Lesbians and Bi Women n=1,070; Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

**TRANSPORTATION:** Generation strongly influences preferred types of transportation used/purchased when away from home.






In the past 12 months, what types of transportation have you used/purchased when away from home?  
(Please mark all that apply.)

	All LGBT	Men	Women	Millennials	Gen X	Boomers
 Car rental	52%	56%	48%	42%	57%	56%
 Uber or Lyft	50%	58%	43%	66%	52%	31%
 Taxi	49%	53%	46%	44%	52%	52%
 Subway within a city	49%	57%	42%	53%	49%	44%
 Train or bus from one city to another city	37%	40%	34%	43%	34%	34%
 Public airport shuttle	35%	37%	34%	33%	34%	39%
 Bicycle rental	7%	9%	6%	9%	7%	6%
 Hire a limousine	6%	8%	5%	4%	6%	9%
None of the above	14%	12%	16%	13%	13%	17%

Base: (Weighted) Gay and Bi Men n=2,215; Lesbians and Bi Women n=1,070; Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

**MOTIVATIONS TO BOOK A HOTEL:** CMI has been asking this same question for a number of years. Location has always been the top motivator to book a hotel. Over the years we have watched LGBT-friendly reputation fall from the second most important reason to book at hotel, to the third most important reason last year, and in 2016, dropping to the fourth most important reason overall. CMI qualitative research indicates that although LGBTs still want to stay in welcoming accommodations, virtually all major hotel groups are now perceived as “LGBT-friendly” so more practical booking motivations have risen up.

When you shop for hotels, how would you rank the following motivators in your selection process?

	Gay & Bi Men	Lesbian & Bi Women	Millennials	Generation X	Baby Boomers
 <b>Location of hotel in destination</b>	Rank #1 1.9	Rank #1 1.9	Rank #1 2.1	Rank #1 1.9	Rank #1 1.8
 <b>Value of price for hotel quality</b>	Rank #2 2.2	Rank #2 2.1	Rank #2 2.1	Rank #2 2.2	Rank #2 2.2
 <b>Low Price</b>	Rank #3/4 3.4	Rank #3 3.1	Rank #3 2.6	Rank #3/4 3.4	Rank #4 3.6
 <b>LGBT-friendly reputation</b>	Rank #3/4 3.4	Rank #4 3.4	Rank #4 3.6	Rank #3/4 3.4	Rank #3 3.3
 <b>Hotel customer loyalty program</b>	Rank #5 4.0	Rank #5 4.2	Rank #5 4.5	Rank #5 4.1	Rank #5 4.0

Base: Weighted Gay & Bi Men n=2,215; Weighted Lesbian & Bi Women n=1,070, LGBT Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

**Shared Economy Accommodations:** LGBT Millennial travelers are more likely than older generations to book shared economy accommodations. That said, both Generation X and Baby Boomers are booking shared economy units, especially private condos and houses, far more than shared rooms within a living space.

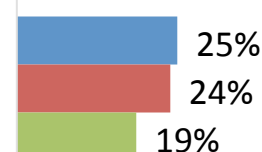
Did you book any of these shared economy or rental by owner accommodations in the past 12 months? (Please mark all that apply.)

*By "shared economy" we mean services where owners rent out their homes, rooms or apartments, typically via an app or website.*

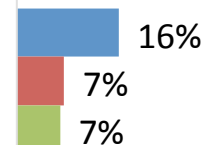
- LGBT Millennials
- LGBT Gen X
- LGBT Boomers



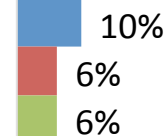
A private condo or house  
(all to yourself)



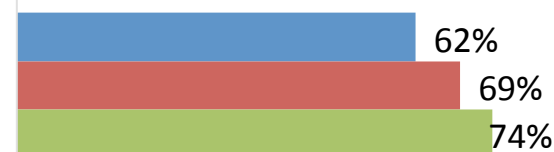
A room in someone's house or  
apartment  
(shared space)



A private unit attached or near  
someone's house (all to yourself)



I did not book any "shared  
economy" accommodations



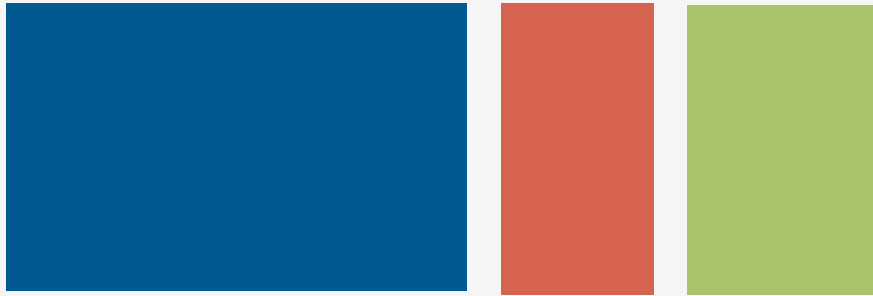
Base: Weighted LGBT Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

21st Annual Survey on

## LGBT Tourism & Hospitality

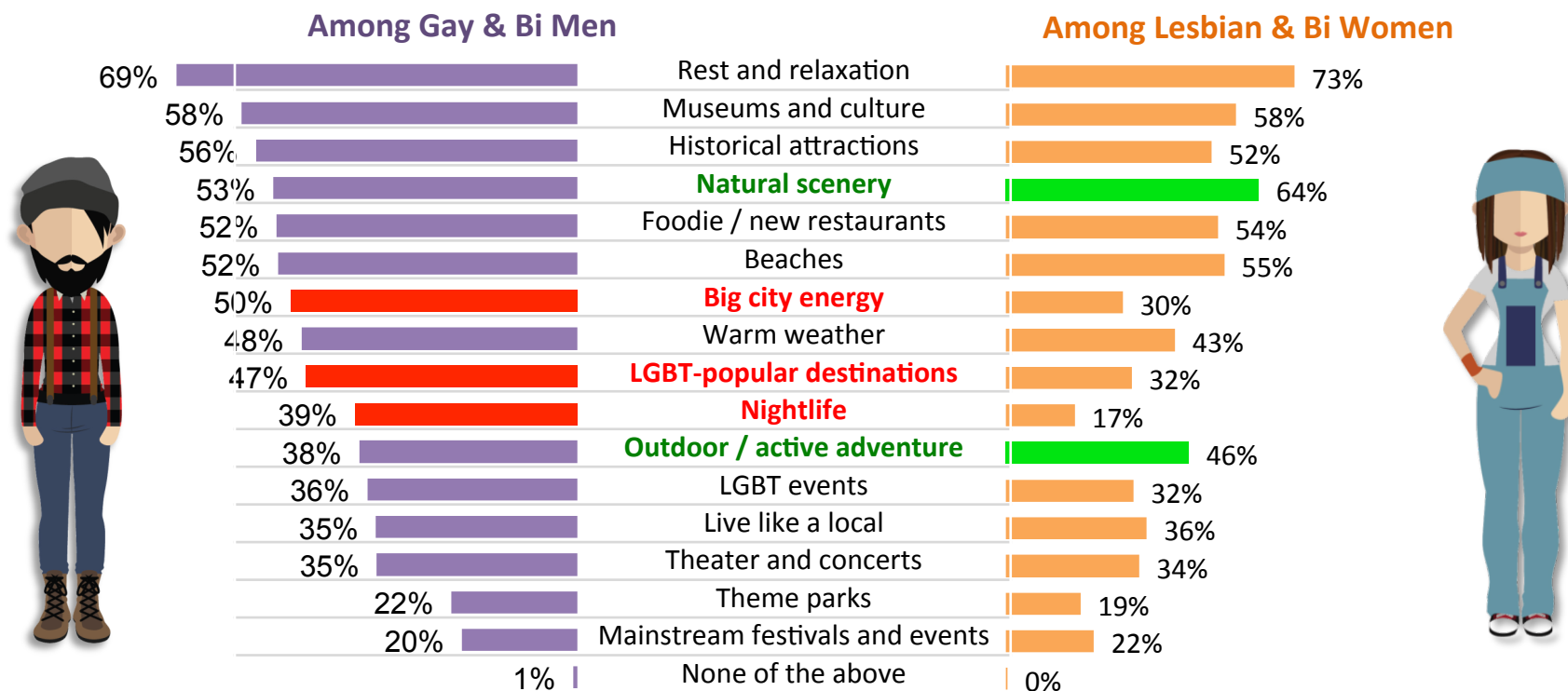
U.S. Overview Report December 2016

# DESTINATIONS



**TRAVELER TYPE BY GENDER:** While there are many similarities by gender in travel personalities, there are also some important differences. Gay and bisexual men are more attracted than lesbian and bisexual women to big city energy and nightlife. In contrast, lesbian and bisexual women have a comparatively greater interest in outdoor activities and natural scenery.

Looking back at all your travel over the last few years,  
what “kind” of traveler are you?



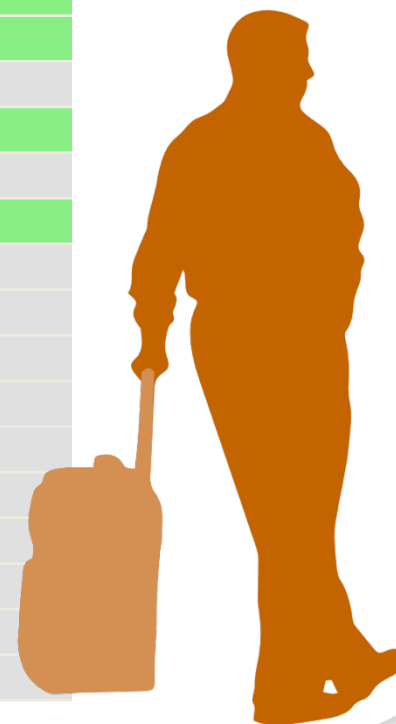
Base: (Weighted) Gay & Bi Men n=2,215; Lesbians and Bi Women n=1,070



**TRAVELER TYPE BY GENERATION:** The top five traveler types are relatively the same across all three generations, but there are some generational differences. Millennials are the generation most interested in cuisine. Baby Boomers are most interested in historical attractions. On the second tier, Millennials have the highest interest in big city energy and nightlife. Millennials also have the most interest in LGBT-popular destinations.

Looking back at all your travel over the last few years, what “kind” of traveler are you?

	Millennials	Generation X	Baby Boomers
Rest and relaxation	69%	74%	70%
Museums and culture	65%	54%	57%
Foodie / new restaurants	63%	52%	43%
Natural scenery	60%	55%	61%
Beaches	54%	57%	48%
Historical attractions	52%	52%	59%
Outdoor / active adventure	49%	43%	34%
Big city energy	47%	37%	33%
LGBT-popular destinations	45%	38%	35%
Nightlife	41%	26%	16%
Warm weather	40%	49%	44%
Live like a local	40%	35%	31%
LGBT events	38%	35%	31%
Theater and concerts	36%	32%	34%
Mainstream festivals/events	26%	20%	17%
Theme parks	25%	24%	12%



Base: (Weighted) Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

**TYPES OF DESTINATIONS:** In a similar question, the survey asked LGBT participants about the type of destination they traveled to in the past 12 months. Differences were not great by gender or generation, with the exception of a big city preference by gay men. For the first time, the survey has collected some information about LGBT travel ratios for beach towns, small towns, rural locations, and mountain resort towns.


In the past 12 months, what type of destinations have you traveled to and spent at least one overnight in a hotel? (Please mark all that apply.)

	All LGBT	Gay and Bi Men	Lesbian & Bi Women	Millennials	Generation X	Baby Boomers
Big city	67%	75%	60%	69%	69%	64%
Medium or small sized city	56%	58%	55%	55%	59%	55%
Beach resort town	36%	40%	34%	30%	41%	37%
Small town	28%	27%	29%	26%	28%	29%
Rural location	15%	14%	15%	14%	15%	16%
Mountain resort town	14%	15%	13%	11%	16%	15%
None of the above	10%	9%	10%	11%	8%	11%

Base: (Weighted) Gay and Bi Men n=2,215; Lesbians and Bi Women n=1,070; Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

**CUISINE WHILE TRAVELING:** LGBT participants were asked about the type of food and drink experiences they seek while traveling. By far, local food and experiences were the top attraction, including neighborhood restaurants and foods famous in the destination.

When traveling, what type of food and drink experiences do you seek?  
(Please mark all that apply.)

	All LGBT	Men	Women	Millennials	Gen X	Boomers
<b>Restaurants popular with locals</b>	<b>74%</b>	<b>75%</b>	<b>73%</b>	<b>73%</b>	<b>74%</b>	<b>74%</b>
<b>Neighborhood restaurants</b>	<b>68%</b>	<b>70%</b>	<b>67%</b>	<b>62%</b>	<b>68%</b>	<b>73%</b>
<b>Foods famous in the destination</b>	<b>57%</b>	<b>58%</b>	<b>57%</b>	<b>63%</b>	<b>56%</b>	<b>53%</b>
Restaurants that get good reviews on social media websites or apps	50%	49%	52%	62%	50%	40%
Restaurants famous in the destination	45%	47%	43%	48%	47%	39%
Tour local wineries	27%	27%	29%	27%	28%	27%
Tour local breweries	25%	22%	28%	32%	25%	18%
Food trucks	24%	22%	26%	32%	24%	16%
New trendy restaurants	23%	28%	19%	31%	22%	16%
Restaurants reviewed by newspapers, magazines, etc.	21%	22%	20%	21%	20%	22%
<i>None of the above</i>	<i>3%</i>	<i>3%</i>	<i>3%</i>	<i>2%</i>	<i>4%</i>	<i>3%</i>

Base: (Weighted) Gay and Bi Men n=2,215; Lesbians and Bi Women n=1,070; Millennials n=1,058; Gen X n=1,113; Boomers n=1,374

**LGBT MICROSITES ON DESTINATION WEBSITES:** Results point to there still being a need for LGBT-specific information and LGBT microsites on tourism office (DMO/CVB) websites. The data also suggests that tourism offices are less likely to reach lesbians and LGBT Millennials through current LGBT outreach programs and their websites in general, and that additional targeted marketing to these segments may be recommended.

Some destination/tourism bureaus have “LGBT sections” on their websites.

Do you agree or disagree with these statements?

**% in Agreement**

	Gay & Bi Men	Lesbian & Bi Women	Millennials	Generation X	Baby Boomers
Having an LGBT website makes me feel that the tourism bureau is LGBT-friendly.	91%	92%	91%	92%	92%
A tourism website should do both, have LGBT imagery throughout the site and offer a specific LGBT page of information.	89%	91%	90%	88%	91%
Having an LGBT website makes me more likely to visit a destination.	74%	73%	75%	73%	72%
I am aware that tourism bureaus offer LGBT website pages.	71%	59%	59%	64%	71%
Including LGBT-inclusive imagery throughout a destination website is more important than having an LGBT-specific section.	58%	64%	64%	64%	55%
I have viewed a tourism bureau's LGBT page in the past 12 months.	52%	37%	35%	44%	52%
LGBT sections on tourism bureau websites are no longer needed.	11%	9%	9%	10%	10%

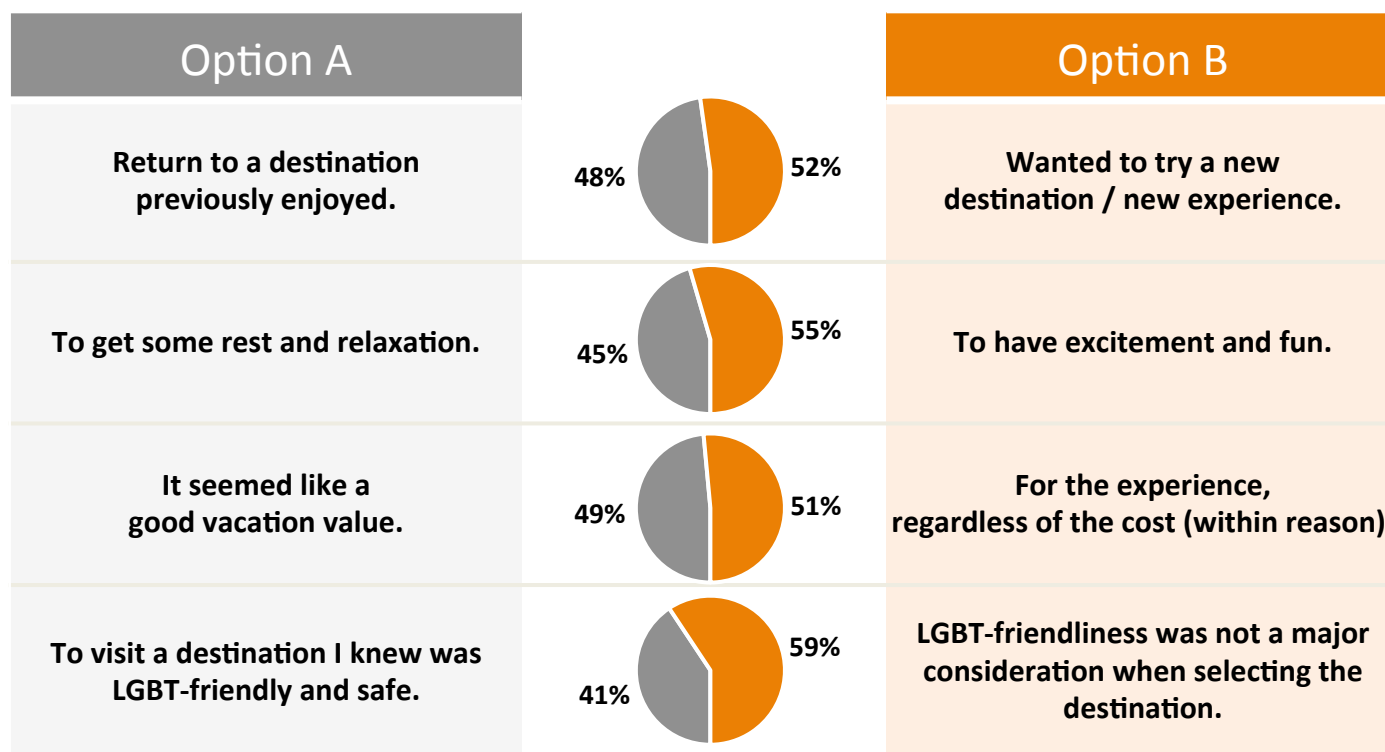
Base: Varies by statements

**ATTITUDE PAIR QUESTIONS:** The survey asked a series of paired, forced-decision questions to determine the gut reactions to vacation selection options. For the most part, the results were quite evenly split for all questions among all LGBT participants.

Think back to your most recent vacation of two or more nights away.

Why did you choose that destination?

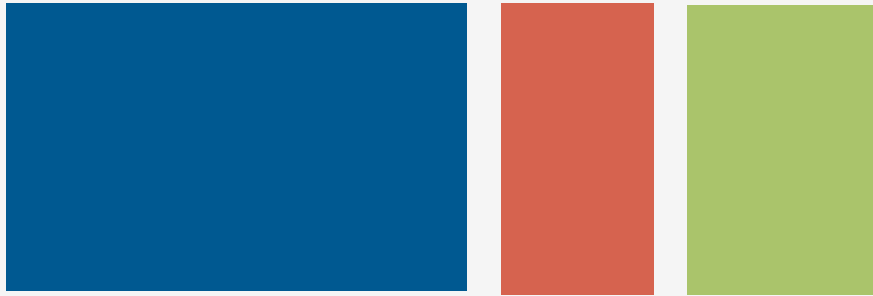
Pick one or the other that was most important to you, from these pairs.



Base: (Weighted) All LGBT n=3,545

21st Annual Survey on  
**LGBT Tourism & Hospitality**  
U.S. Overview Report December 2016

# ANNUAL DESTINATION RANKINGS



# Top U.S. Destinations | Leisure | Gay & Bisexual Men | 2016

Please tell us if you have visited these places in the past 12 months for leisure or business travel reasons  
AND spent a night in a hotel or paid accommodation.

## *Among Gay and Bisexual Men in the United States*

Rank	Destination	% Visited
1	New York City	25%
2	Las Vegas	19%-20%
2	Los Angeles Metro Area	19%-20%
2	San Francisco	19%-20%
5	Chicago	16%-17%
5	Ft. Lauderdale/Wilton Manors	16%-17%
7	Miami/ South Beach	14%-15%
7	Orlando	14%-15%
7	Palm Springs	14%-15%
7	Washington, DC	14%-15%
11	New Orleans	10%-11%
11	San Diego	10%-11%

Rank	Destination	% Visited
13	Boston, Key West, Florida Keys, Philadelphia, Seattle	9%

Rank	Destination	% Visited
18	Atlanta, Dallas, Denver, Hawaii, Napa County, Phoenix, Portland, Provincetown, Sonoma County, Tampa	7% -8%
Other Top Cities	Albuquerque, Austin, Asheville, Baltimore, Charleston, Cleveland, Columbus, Houston, Nashville, Rehoboth Beach, Sacramento, San Antonio, Savannah, St. Louis, St. Petersburg	4% - 6%

Base: USA Gay and Bisexual Men n=2,215

Grouping by percentage: CMI groups by percentage because the margin of error is near 3%. CMI feels this method stabilizes the ranking for year-to-year comparisons within the margin of error.



## Top U.S. Destinations | Leisure | Lesbians and Bisexual Women | 2016

Please tell us if you have visited these places in the past 12 months for leisure or business travel reasons  
AND spent a night in a hotel or paid accommodation.

### *Among Lesbians and Bisexual Women in the United States*

Rank	Destination	% Visited
1	New York City	18%
2	San Francisco	17%
3	Chicago	13%-14%
3	Las Vegas	13%-14%
3	Los Angeles Metro Area	13%-14%
6	Boston	11%-12%
6	Orlando	11%-12%
6	Washington, DC	11%-12%
9	Denver	9-10%
9	San Diego	9-10%
9	Seattle	9-10%

Rank	Destination	% Visited
12	Atlanta, Denver, Fort Lauderdale, Key West/Florida Keys, Miami/South Beach, New Orleans, Palm Springs, Portland, Philadelphia, Tampa	7%-8%
Other Top Cities	Asheville, Austin, Baltimore, Columbus, Dallas, Detroit, Hawaii, Houston, Madison, Napa County, Nashville, Phoenix, Pittsburgh, Provincetown, Sacramento, San Antonio, Sonoma County, St. Louis, St. Petersburg, Rehoboth Beach	4-6%

Base: USA Lesbian and Bisexual Women=1,070

Grouping by percentage: CMI groups by percentage because the margin of error is near 3%. CMI feels this method stabilizes the ranking for year-to-year comparisons within the margin of error.

## Top U.S. Destinations | Business | U.S. LGBT | 2016

Rank	Destination	% Visited
1 <sup>st</sup> Tier	Chicago, Los Angeles, New York City, Washington, DC	8+%
2 <sup>nd</sup> Tier	Atlanta, Dallas, Las Vegas, San Francisco	6-7%
3 <sup>rd</sup> Tier	Denver, Houston, Miami, Orlando, Philadelphia, San Diego, Seattle	4-5%
4 <sup>th</sup> Tier	Atlanta, Austin, Baltimore, Boston, Detroit, Fort Lauderdale, Houston, Nashville, New Orleans, Phoenix, Portland, Sacramento, St. Louis, Tampa	3%

Base: USA LGBTs n=3,723

Grouping by percentage: CMI groups by percentage because the margin of error is near 3%. CMI feels this method stabilizes the ranking for year-to-year comparisons within the margin of error.

## 2016 Major Metro USA + Canada Destination LGBT “Power Rankings”

The LGBT Power Ranking calculates if a person visited a destination at least one time for leisure or business in the past year, then weights the results by gender and generation, then further weights USA and Canadian travelers.

Rank	Destination
1	New York City
2	San Francisco
3	Los Angeles
4	Las Vegas
5	Chicago
6	Washington, DC
7	Orlando
8	Fort Lauderdale
8	San Diego
8	Seattle

Rank	Destination
11	Boston
12	Atlanta
12	Miami
12	Philadelphia
15	Dallas
15	Denver
15	New Orleans
15	Palm Springs
19	Portland
19	Toronto

Rank	Destination
21	Houston
21	Phoenix
21	Tampa
24	Austin
24	Baltimore
24	Hawaii
24	Vancouver
28	Montreal
28	Nashville
30	Columbus, Detroit, Pittsburgh, San Antonio St. Louis

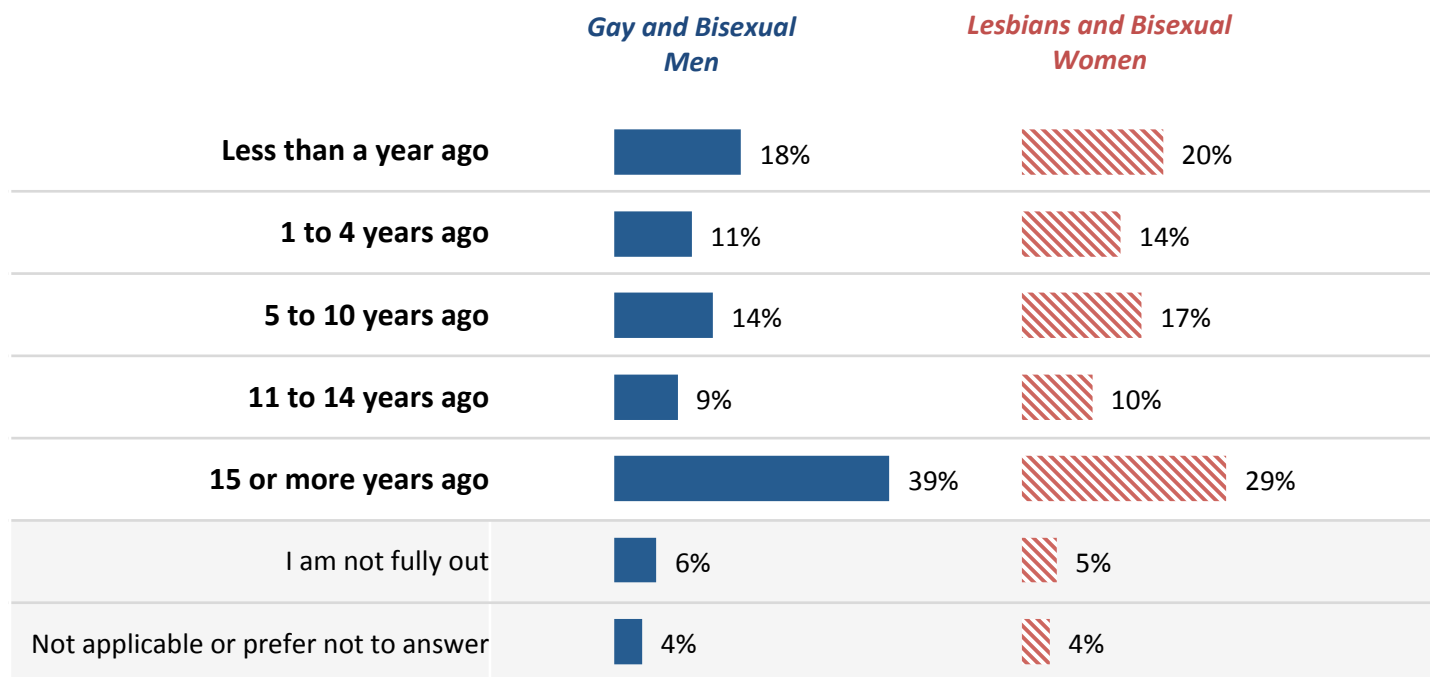
Base: USA and Canadian LGBTs n=4,404

# The 2015 Report

*Since we can not ask every question every year, we included some interesting results from the 2015 study which CMI feels are still relevant.*

**Being Out as an LGBT Traveler:** A high percentage of LGBT community members have been traveling as fully out LGBT travelers for 15 years or more. This is of interest as new marketing initiatives should recognize that the “mind-set” of a long-term fully out LGBT traveler may be different than a young LGBT person.

How long has it been since you went on your first vacation as a fully out LGBT traveler?

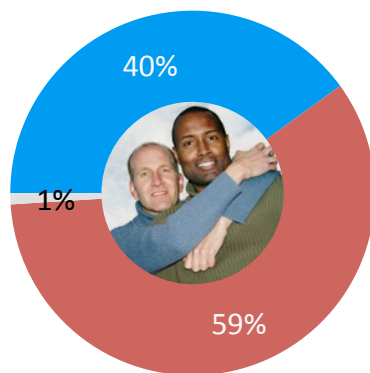


Bases: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406

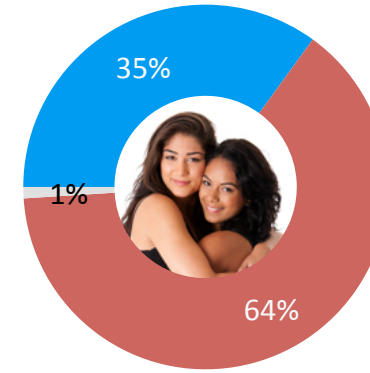
**Visiting LGBT Friends:** Destinations like Fort Lauderdale and Palm Springs, known for their high proportion of LGBT residents, have always been known to attract “visiting LGBT friends travel.” CMI tested the concept nationally and found that 40% of gay and bisexual men and 35% of lesbians and bisexual women had taken an overnight vacation trip primarily to visit an LGBT friend in the past 12 months. When they do, just under half exclusively stay at the LGBT friend’s house, while the other half spend at least some time in paid accommodations. The impact of LGBT friend visitation can be substantial for hotels, restaurants and attractions in these communities.

In the past 12 months have you taken an overnight vacation trip primarily to visit an LGBT friend?

*Among Gay and Bisexual Men*



*Among Lesbians and Bisexual Women*



**On the last trip taken to primarily visit an LGBT friend, did you...?**

	<i>*Men</i>	<i>*Women</i>
Stay overnight at LGBT friend's house	44%	51%
Stay overnight in a hotel or paid accommodation	32%	26%
Combination of both	25%	23%

Bases: USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406; USA Gay and Bisexual Men (Visited an LGBT Friend) n=909; USA Lesbians and Bisexual Women (Visited an LGBT Friend) n=494

**Cruises:** 16% of LGBT community members reported having taken any type of cruise in the past year. Of those who took a cruise, most of these cruises were mainstream/general population cruise departures. However, a third of older LGBTs reported taking some type of LGBT group or charter cruise. The percentage significantly drops for Millennials.

Have you taken a cruise in the past 12 months of at least one night at sea?



**16%** of LGBTs took a cruise in the past 12 months.



**18%** of gay and bisexual men took a cruise, compared to 13% of lesbians and bisexual women.

### Types of Cruises Taken in the Past 12 Months

*Among Cruise Takers Only • Multiple Selections Permitted*

	Millennials	Gen X	Boomers
Mainstream/general population cruise departure	91%	71%	69%
LGBT charter cruise (like Atlantis or Olivia), small LGBT group on a mainstream cruise organized by a travel agent or small LGBT group on a mainstream cruise organized by friends or family	13%	33%	33%

Bases: All USA LGBTs n=3,768; USA Gay and Bisexual Men n=2,262; USA Lesbians and Bisexual Women n=1,404



**Work Vacation Days Use:** LGBTs who are employed full-time received a median 20 vacation days per year. Of note, those who receive two weeks of vacation per year tend to take the full amounts. Those who receive more than two weeks are less likely to use their full vacation time allocation.

### Vacation Day Use

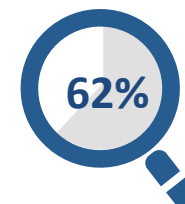
*Median # of  
Vacation Days*



*Median # of Vacation Days Used 15  
(75% of Available)*



*% Using Maximum  
Provided Days or More*



#### Results by Number of Vacation Days Available

	1-7 Days	8-14 Days	15-21 Days	22-30 Days	31+ Days
<b>% of LGBTs Surveyed</b>	<b>7%</b>	<b>24%</b>	<b>39%</b>	<b>21%</b>	<b>8%</b>
% Taking Less Vacation Time than Available	52%	17%	41%	51%	45%
% Taking the Maximum Vacation Time Available or More than Available	48%	83%	59%	49%	55%
<b>Median Days Used</b>	<b>5</b>	<b>10</b>	<b>15</b>	<b>23</b>	<b>35</b>

Bases: USA LGBTs (Employed Full-time and Responded) n=2,016

**LGBT Activities While on Vacation by Gender:** The results indicate that LGBT-specific activities in a destination while on vacation are still quite important, especially for gay and bisexual men. Going to the LGBT neighborhood, having dinner in the LGBT neighborhood and going to a gay bar were important.

In the past 12 months, have you participated in any of these LGBT-specific activities while on vacation in a different city than you live? Please mark all that apply.  
When on vacation in a different city, I have...

	<i>Gay and Bisexual Men</i>	<i>Lesbians and Bisexual Women</i>
Went to a gay/lesbian bar	66%	38%
Went to an LGBT neighborhood	61%	39%
Went to a restaurant in the LGBT neighborhood	61%	37%
Went to a gay/lesbian nightclub	47%	22%
Purchased clothes or other retail items in the LGBT neighborhood	35%	18%
Used a dating website or mobile app to meet others	31%	4%
Attended an LGBT Pride event	25%	19%
Attended an LGBT party event other than Pride	24%	17%
Spent a night in an LGBT-dedicated hotel or guesthouse	20%	7%
Visited the local LGBT community center	10%	9%
Attended an LGBT fundraising gala costing \$100 or more	7%	4%
Attended an LGBT conference	7%	9%

Bases: USA Gay and Bisexual Men n=2,229; USA Lesbians and Bisexual Women n=1,362

**LGBT Activities While on Vacation by Generation:** The results indicate that LGBT-specific activities in a destination while on vacation are more popular for Millennials than Baby Boomers, especially going to LGBT neighborhoods and LGBT nightlife. Attending an LGBT Pride event while on vacation was especially popular for Millennials, compared to Baby Boomers.

In the past 12 months, have you participated in any of these LGBT-specific activities while on vacation in a different city than you live? Please mark all that apply.

When on vacation in a different city, I have...

	<i>Millennials</i>	<i>Gen X</i>	<i>Boomers</i>
Went to a gay/lesbian bar	60%	56%	46%
Went to an LGBT neighborhood	56%	53%	46%
Went to a restaurant in the LGBT neighborhood	49%	51%	48%
Went to a gay/lesbian nightclub	48%	39%	28%
Attended an LGBT Pride event	31%	22%	19%
Used a dating website or mobile app to meet others while on vacation	29%	20%	13%
Attended an LGBT party event other than Pride	28%	19%	18%
Purchased clothes or other retail items in the LGBT neighborhood	22%	30%	28%
Attended an LGBT conference	10%	8%	8%
Visited the local LGBT community center	8%	8%	11%
Spent a night in an LGBT-dedicated hotel or guesthouse	8%	14%	16%
Attended an LGBT fundraising gala costing \$100 or more	4%	6%	7%

Bases: USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490

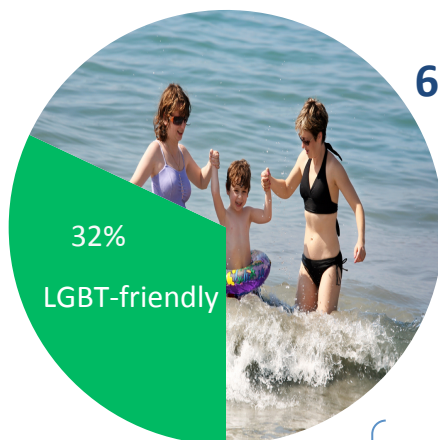
**LGBT Families:** This question was asked for the third year in order to track trends. As in past years, when traveling with children, the majority of LGBT parents are motivated by child-friendly destinations and child-friendly hotels, over LGBT-friendly destinations and hotels. Of note is that over the three year time period, LGBT parents have become even more dedicated to choosing child-friendly options. LGBT-friendly preference dropped 10% for destinations and 5% for hotels over the three year period.

If you had to pick one...

When traveling with your children, what is more important to you and your family, when you are...?

*Among Parents of Children Under 18*

### CHOOSING A VACATION DESTINATION



### CHOOSING A HOTEL

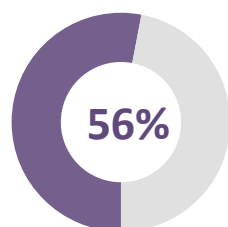


70% of lesbian and bi female parents chose child-friendly, compared to 63% of gay and bisexual male parents for destination consideration.

Bases: USA LGBT Parents of Children Under 18 n=291; USA Gay and Bisexual Male Parents of Children Under 18 n=75;  
USA Lesbians and Bisexual Female Parents of Children Under 18 n=204

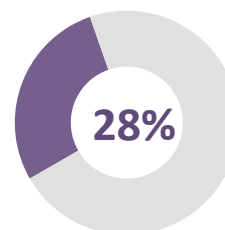
**LGBT Grandparents:** Long overlooked, many LGBTs are grandparents who travel with grandchildren. [2015 CMI LGBT Community Survey](#) respondents who have children over age 18 included 32% of LGBT Baby Boomer lesbian and bisexual women, 17% of Baby Boomer gay and bisexual men, and 18% of transgender community members. In this report, 56% of parents of children over age 18 were also grandparents, and 28% went on a vacation with their grandchildren in the past year. Multigenerational travel is a hot topic in the travel industry right now, and the LGBT community should be included in that discussion.

You said you have children over age 18. Are you also a grandparent?

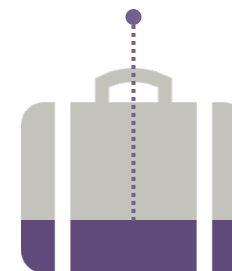


56% of parents of children over age 18 are also **grandparents**.

59% of gay and bisexual men with children over age 18 are grandparents compared to 53% of lesbian and bisexual female parents of 18+ children.



28% **Went on a vacation** with their grandchildren.

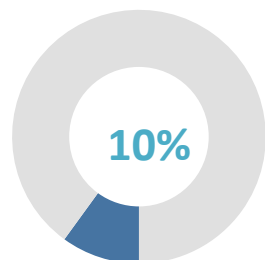


Bases: USA LGBT Parents of Children Over 18 n=482; USA Gay and Bisexual Male Parents of Children Under 18 n=228; USA Lesbians and Bisexual Female Parents of Children Under 18 n=239; USA LGBT Grandparents n=265

**Community-Specific Events:** LGBT segment cultural, sporting and professional events are big business. 10% of gay and bisexual men reported attending a Bear community event the past year. 19% of lesbians and bisexual women reported attending a lesbian/bi women's event in the past year. 26% of transgender community members reported attending a transgender event in the past year.

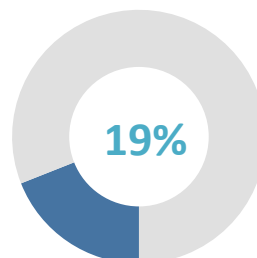
### Event Travel/Attendance in Past 12 Months

#### BEAR EVENT



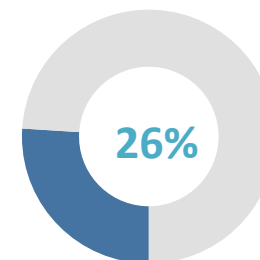
of **gay and bi men** have attended a bear event.

#### LESBIAN/BI WOMEN'S EVENT



of **lesbian/bi women** have attended a lesbian/bi women's event.

#### TRANSGENDER COMMUNITY EVENT



of **trans individuals** have attended a trans event.

Bases: USA Gay and Bisexual Men n=2,251; USA Lesbians and Bisexual Women n=1,401; USA Transgender Respondents n=132

**Type of Hotel Booked:** LGBTs book a wide variety of hotels and accommodations, and often different types within the same year. This graph provides a view of gender distribution across various types of hotels. It is noted that gay men trend higher with more traditional hotels, and lesbians trend higher with “non-hotel” accommodations (although lesbians are still more likely to stay in traditional hotels).

In the past 12 months, in which type of accommodations did you stay?

	<i>Gay and Bisexual Men</i>	<i>Lesbians and Bisexual Women</i>
Large urban / city core brand hotel	54%	47%
A midrange hotel brand	53%	51%
Medium sized hotel in a city	42%	41%
A luxury hotel brand	34%	27%
Boutique or small design oriented hotel	30%	21%
Any hotel located in the suburbs of a city	27%	24%
A budget hotel brand	23%	22%
Small hotel or motel in a city	22%	19%
Medium sized hotel in a resort area	20%	17%
Large hotel in a resort area	19%	16%
Any motel along a highway	17%	16%
Small multi room guest house or B&B in a city	12%	13%
Small B&B in a resort area	10%	10%
Booked an apartment or condo rented by owner	10%	11%
Couch surfed for free	9%	11%
Booked an entire house rented by owner	8%	12%
Stayed overnight in my own vacation home	8%	6%
Camped in a tent	5%	12%
Booked a paid room in someone's house	4%	6%
RV Park	2%	6%
Booked an apartment or unit attached to someone's house	2%	3%
Stayed overnight in my own timeshare	4%	7%

Bases: USA Gay and Bisexual Men n=2,230; USA Lesbians and Bisexual Women n=1,394



**Actual vs. Preferred Accommodation Booking Methods:** The LGBT community both books and prefers to book directly on a hotel's website over online travel sites. While 17% of LGBTs booked an accommodation on a rental-by-owner or shared economy website (e.g. Airbnb, HomeAway, VRBO), only 6% prefer that method.

*Past 12 Month*  
**Actual Booking Methods Used vs. Preferred Booking Methods**

Actual Booking Method (Multiple)		Preferred Booking Method (Pick One)
63%	Direct on hotel's website or app	43%
46%	Online travel agency booking website or app (e.g., Orbitz, Kayak, Hotels.com)	34%
21%	Telephone directly to hotel	7%
17%	Rental-by-owner or shared economy website (e.g., Airbnb, HomeAway.com, VRBO.com)	6%
10%	A travel agent	3%
8%	Deals website (e.g., Groupon, Living Social)	2%
5%	Credit card rewards website (e.g., Chase Ultimate Rewards, Capital One No Hassle Rewards)	1%

Bases: All LGBT USA ("In the past 12 months, which of the following services did you use to book a hotel or other accommodation?") n=3,772; All LGBT USA ("If you had to pick just one, what is your preferred way of booking hotels?") n=3,752

## Actual vs. Preferred Accommodation Booking Methods by Age and Gender: LGBT

Millennials prefer to book using online travel agencies over direct hotel bookings, while Baby Boomers prefer direct hotel bookings. Rental-by-owner or shared economy website bookings were stronger among Millennials.

### Past 12 Month

#### Actual Booking Methods Used vs. Preferred Booking Methods

Actual Booking				Preferred Booking		
Millennials	Gen X	Boomers		Millennials	Gen X	Boomers
55%	66%	65%	Direct on hotel's website or app	37%	45%	46%
50%	53%	43%	Online travel agency booking website or	42%	38%	29%
23%	18%	16%	Rental-by-owner or shared economy website	10%	6%	6%
16%	18%	26%	Telephone directly to hotel	4%	4%	9%
10%	8%	8%	Deals website (e.g., Groupon, Living Social)	4%	3%	2%
8%	9%	11%	A travel agent	2%	2%	4%
6%	5%	5%	Credit card rewards website	1%	1%	1%



### Gay/Bi Men

### Booking Differences by Gender

### Lesbians/Bi Women

65%	Actually booked	direct on hotel's website or app	60%
46%	Prefer booking	direct on hotel's website or app	40%
15%	Actually booked	via rental-by-owner or shared economy website (e.g. Airbnb, etc.)	21%
4%	Prefer booking	via rental-by-owner or shared economy website (e.g. Airbnb, etc.)	9%

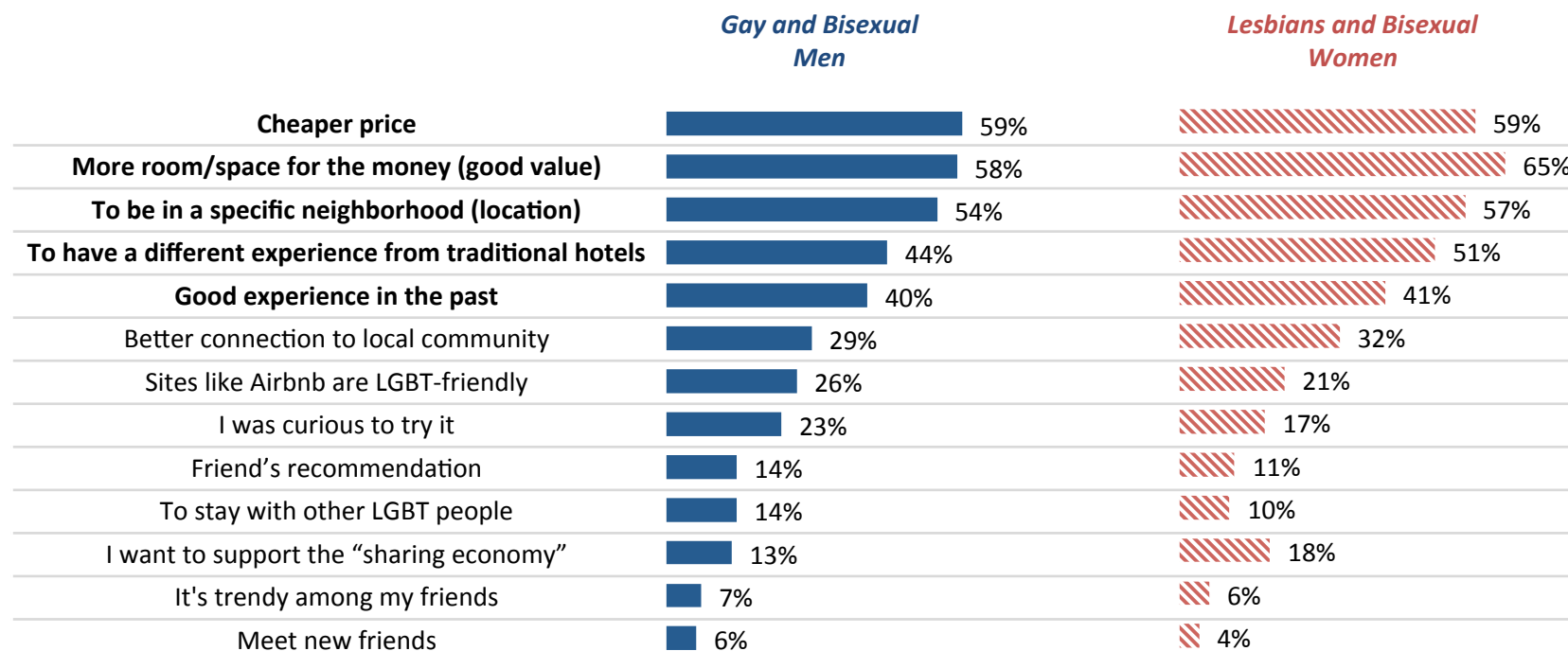


Bases: All LGBT USA ("In the past 12 months, which of the following services did you use to book a hotel or other accommodation?") n=3,772; All LGBT USA ("If you had to pick just one, what is your preferred way of booking hotels?") n=3,752; (Bases Vary Slightly by Question) USA LGBT Millennials n=774; USA LGBT Gen X n=1,171; USA LGBT Boomers n=1,490; USA Gay and Bisexual Men n=2,264; USA Lesbians and Bisexual Women n=1,406

**Reasons to Book Shared Economy Accommodation:** The major reasons that LGBTs book a shared economy website were cheaper price, better value, and to be in a specific neighborhood. Of note is that 23% of gay and bisexual men and 17% of lesbians and bisexual women said they tried it in the past 12 months because they were curious.

You said that you have stayed in a “shared economy” or rental by owner accommodation in the past year. Please tell us why you used this service over a traditional hotel.

*Among “Shared Economy” or Rental by Owner Customers*



Bases: USA Gay and Bisexual Men n=333; USA Lesbians and Bisexual Women n=294

CMI's highly specialized services are based on 25 years of dedicated experience, producing LGBTQ (lesbian, gay, bisexual, transgender, queer/questioning) market intelligence for leading corporate clients and organizations across the country and around the world.

Serving a variety of industries, we leverage our in-house proprietary panel of more than 75,000 community-representative LGBT consumers to produce consumer survey studies, recruit and facilitate focus groups, interviews, etc. Additionally, our team of experts offers strategic consulting and marketing planning based on consumer insight, and we produce custom LGBT research/sales/marketing/best practices corporate training and conference presentations.

Diversity procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT Owned Business Enterprise.

## For more information:

Let us help you better understand your opportunities, grow your LGBT market share, and improve return on investment.



### Community Marketing & Insights

584 Castro St. #834

San Francisco, CA 94114 USA

Tel +1 415/437-3800 • Fax +1 415/552-5104

[info@CommunityMarketingInc.com](mailto:info@CommunityMarketingInc.com)

Visit [www.communitymarketinginc.com](http://www.communitymarketinginc.com)





# ABOUT CMI'S LGBT RESEARCH PRACTICE

Founded in 1992, Community Marketing & Insights (CMI) is a full-service market research firm, focused on LGBT insights and analytics.

Market research studies and resulting insights and action items are meant to help marketers understand the LGBT communities, and influence sales, marketing and outreach decisions. However, not all research is the same. Community Marketing & Insights' (CMI) methodologies and experience are distinct from other research companies when considering approaches, survey respondent sources—and ultimately—the validity and utility of sought-after results.

Community Marketing & Insights (CMI) has been conducting LGBT consumer research for 25 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards in North America, Europe and Asia. Industry leaders around the world depend on CMI's research and analysis as a basis for feasibility evaluations, positioning, economic impact, creative testing, informed forecasting, product development, measurable marketing planning and assessment of return on investment.

CMI's research findings have been published in the New York Times, Wall Street Journal, Forbes, Washington Post, Chicago Tribune, Los Angeles Times, USA Today, Chicago Tribune, Miami Herald, CBS News, CNN, NPR, Reuters, Associated Press and many other international, national and regional media.

CMI's research and corporate training clients span the globe, and include leaders from a wide range of industries. CMI studies have been produced for these and many other B2B and B2C brands: Aetna, Inc.; Credit Suisse; Prudential Financial; Wells Fargo; DIRECTV, LLC; Viacom/Logo; Johnson & Johnson; WNBA; Hallmark Cards, Inc.; Target Brands; E&J Gallo Winery; Gilead Pharmaceuticals; Better Homes & Gardens Real Estate; TELUS Corporation; Hyatt Hotels Corporation; Hawaiian Airlines; NYC & Company; Las Vegas Convention & Visitors Authority; VISIT FLORIDA; Hawaiian Tourism Authority; Canadian Tourism Commission; Tourism Office of Spain; Japan National Tourism Organization; U.S. Census Bureau; Centers for Disease Control; American Cancer Society; Kaiser Family Foundation; University of Pennsylvania; City University of New York; and numerous other corporations, universities and organizations across North America and around the world.





## ABOUT THE CMI RESEARCH PANEL

Over the past 20 years, CMI has developed the world's most community-representative panel for a variety of LGBT research methodologies. Corporations, government agencies, non-profits, universities and other research firms all utilize CMI's panel resources because of its size and flexibility. CMI can assist with research projects requiring thousands of participants, and we can deliver on smaller projects requiring targeted segments within LGBT. For example, CMI was able to recruit for projects needing 1,200 men living with HIV, 200 LGBT African American Millennials in urban U.S.A., and 750 transgender community members. We also produce qualitative projects that are challenging—or impossible—for other research groups to achieve.

CMI has developed our panel through authentic partnership and trust within the LGBT community. CMI never uses the panel for sales or marketing purposes. Panel members have the direct email addresses of their project's Research Director. We protect panelist confidentiality, and we respond to study questions, concerns and feedback within 24 hours. Since CMI is a specialized LGBT-owned and operated company, established over 20 years ago, we have earned a level of confidence and trust that can only come from being members of the community. As distinct from other panel approaches, we actually have a very personal relationship with our panelists, who are willing to open up and honestly share genuine experiences, sensitivities, opinions and motivations with us. They know that the results from the research will be used for the betterment of the LGBT community.

### CMI'S PANEL CONSISTS OF OVER 70,000 SELF-IDENTIFYING LGBT COMMUNITY MEMBERS, WHICH INCLUDES:

- 60,000 LGBT panelists in the United States
- 7,000 LGBT Canadians (includes English and French speaking)
- 4,500 LGBT Chinese
- Capabilities in the UK, Germany, Australia and other countries

### IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBT SEGMENT

- Over 20,000 lesbian and bisexual women
- Over 30,000 gay and bisexual men
- 3,000 transgender community members
- 5,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 15,000 representing LGBT communities of color
- 15,000 LGBT Millennials
- Thousands of men living with HIV (Note: All health-related data is maintained independent of personally identifying information)
- Participants in all 50 states with ZIP code-level geographic targeting capability
- 10,000 with a master's degree or better
- 4,000 LGBT parents with a child under 18 living at home
- 8,000 legally married same-sex couples
- Experience with LGBT youth research (in partnership with an institution and IRB approval)

## CMI'S LGBT STRATEGIC PLANNING & CORPORATE TRAINING

**CONSULTING:** Evaluating your opportunities and strengths based on research findings, strategic consulting identifies brand and product positions that can lead to maximum success and return on investment. We'll also assess your corporate policies and practices—crucial to LGBT loyalty. LGBT consumers tend to vote with their wallets: they favor good corporate/community citizens.

**TRAINING:** The Community Marketing team has developed and presented custom on-site training for a wide variety of companies and organizations exploring their opportunities in the LGBT community. The trainings may include topics ranging from a basic introduction to the LGBT community, research, case studies and marketing opportunities...to diversity/sensitivity training best practices...to sales training and customer service.

*LGBT Community Survey and Community Marketing are registered trademarks of Community Marketing, Inc.*

*Minority/Diversity Procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT-Owned Business Enterprise.*



## CONTACT US

Visit [www.CMI.info](http://www.CMI.info), email [research@CommunityMarketingInc.com](mailto:research@CommunityMarketingInc.com), or call +1 415-437-3800

584 Castro St., #834, San Francisco CA 94114 USA

# LGBT Market Research:

*There is a difference!*

LGBT research is meant to help marketers understand the LGBT community, and make educated decisions about strategies and tactics to reach them. Not all research is the same, however. At **Community Marketing & Insights**, we leverage unique experience, methodologies and our own proprietary panel to generate the valid and actionable results that our clients depend on.

---

## CMI'S PROPRIETARY PANEL: WHO ARE YOU TALKING TO?

Community Marketing & Insights (CMI) has recruited for our proprietary consumer panel over the past 25 years by partnering with over 300 LGBT media, organizations, events and social media throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is thus highly representative of LGBT consumers who interact with the LGBT community and media.

CMI research is trusted by—and frequently quoted in—The New York Times, USA Today, The Wall Street Journal, Chicago Tribune, Los Angeles Times, Miami Herald, Forbes, Ad Week, NPR, CNN, CBS News, Associated Press, etc.

*Other research providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate in a survey that they are gay or lesbian. They may also use lists from one or two LGBT publishers, which is likely to skew results.*

*If you are a marketer looking for valid LGBT consumer insights about products, services, or advertising creative and marketing strategies, “general market” panel development approaches are not likely to yield LGBT community members who interact with the media where you are placing ads.*

## CMI'S QUANTITATIVE SURVEYS: SIZE DOES MATTER

CMI has conducted hundreds of LGBT-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market.

Size does matter when it comes to surveys. Our panel has grown to over 70,000 qualified LGBT consumers—the largest of its kind, by far. Our Annual LGBT Community Survey® study has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

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.

*Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or “reinvent the wheel” at your expense.*

*It's not possible to fathom the diversity and complexities within LGBT (see below) through a small sample. And with small samples, you lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Atlanta? Generalities and sweeping statements about “the LGBT market” based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.*

## LGBT PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO “LGBT MARKET”

Community Marketing & Insights emphasizes that there is no “gay market,” just as there is no single “Asian market.” The LGBT communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Add to that variations in geographical location, age, income, relationship status, gender identity and more, and it becomes essential to discover which opportunities within LGBT will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBT will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

*General market surveys that may include a small subset of “the gay community” just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.*

## GET A DEEPER UNDERSTANDING OF THE LGBT COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. Quantitative (data) research is important, but it's just one side of the coin. Our full range of research services uncover the rest of the story through 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, UK, Germany, Australia and China, as well as many other markets. Sometimes the same creative, tested in different regions, can yield different perspectives. 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 qualitative research, including focus group studies (both in-person and online), in-depth interviews, online communities and advisory boards, which can round out a comprehensive market intelligence plan.

*By producing online surveys only, other research companies are telling only 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 can only be uncovered by qualitative research—extremely important considerations that averages and assumptions extrapolated from survey statistics are likely to miss.*

## IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced, sophisticated research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

*Unlike many other firms, CMI will never sell or represent another research company's services. Nor will we outsource your projects and report on the results of a third party's work. Without being intimately involved in every aspect of a project—discussing client goals, designing the study, building and implementing the survey, and engaging directly with consumers in focus groups—it is difficult to gain the insights that we regularly deliver. CMI's hands-on LGBT research specialization spanning over two decades is unmatched.*

## VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBT market intelligence, however, and the cumulative 60+ years of LGBT-dedicated experience among the CMI team, we're able to keep your costs low. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 25 years.

*At CMI, we're not running a large operation juggling many accounts and projects with varied focus. Our client dedication and LGBT market specialization delivers you superior intelligence at a fraction of the cost.*

## WE ARE TRUSTED. WHY THIS IS IMPORTANT:

Community Marketing, Inc., founded in 1992, pioneered LGBT consumer research. Because our company is 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 that ultimately lead to social progress, better conditions for LGBT employees, and more 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 & Insights, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the world's only LGBT-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBT-Owned Business Enterprise.

## AND PROUD OF OUR 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 leading business and advocacy organizations, events and conferences within the community, such as Out & Equal, HRC, National Gay & Lesbian Chamber of Commerce, GLAAD, NCLR and the International Gay & Lesbian Travel Association. Our community connection is not only the right thing to do, it is essential for maintaining authentic community relationships to benefit our clients.



*Proud to serve these and other companies, organizations, universities,  
government institutions and researchers with*

## **LGBT Community Research Studies, Strategic Consulting and Corporate Training** *since 1992*