

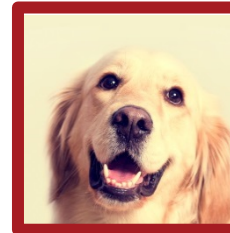
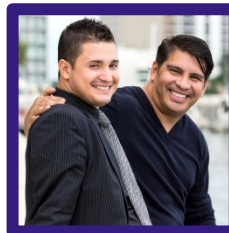
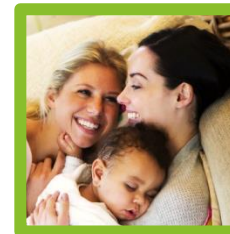
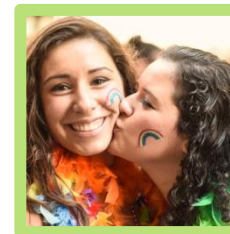
22nd Annual LGBTQ Tourism & Hospitality Survey

U.S. Overview Report
November 2017

In partnership with



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ABOUT CMI

25 YEARS OF LGBTQ INSIGHTS



- › Community Marketing & Insights (CMI) has been conducting LGBTQ consumer research for over 25 years. Our practice includes online surveys, in-depth interviews, intercepts, focus groups (on-site and online), and advisory boards. 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 from CMI's research reports 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, NPR, CNN, Reuters, 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: Las Vegas Convention & Visitors Authority, Visit Orlando, Visit Philadelphia, Greater Fort Lauderdale CVB, Tourism Toronto, Travel Portland, Visit Florida, Hawaii Tourism Authority, Empire State Development Corp., Choose Chicago, Argentina Tourism Office, Hawaiian Airlines, Hyatt Hotels, W Hotels, Kimpton Hotels, Wells Fargo Bank, Aetna, Target Brands, Hallmark, DirecTV, Johnson & Johnson, WNBA, American Cancer Society, AARP, Kaiser Family Foundation, U.S. Census, CDC, FDA, and numerous other corporations, organizations, universities and government institutions across North America and around the world.



RESEARCH DESIGN

25 YEARS OF LGBTQ INSIGHTS

Community Marketing & Insights (CMI) has built a proprietary research panel of 80,000+ LGBTQ consumers through partnerships with more than 300 LGBTQ publications, websites, blogs, social media, apps, events and organizations since 1992. Importantly, the panel reflects the readership/membership of a broad range of LGBTQ-focused media outlets, organizations and events. This means that the results summarized here are representative of LGBTQ travelers who are “out” and interacting within the LGBTQ community.

- › 10 minute online survey conducted in October 2017.
- › This report focuses on United States data for 3,703 self-identified members of the LGBTQ community.
- › 88% of participants came from a random sample of the Community Marketing & Insights LGBTQ research panel. The panel was built over a 25 year period with the partnership of over 300 LGBTQ media, organizations and events.
- › 12% of the participants came from email/social media distribution from the following national LGBTQ media: *Curve Magazine*, *GayCities*, *ManAboutWorld* and *Passport Magazine*.

- › For the purposes of this report, weighted results were calculated with the following assumptions; Millennial (1981-1998) 33%, Generation X (1965-1980) 33%, Baby Boomer (1946-1964) 33%; gay and bisexual men 47.5%, lesbian and bisexual women 47.5%, gender expansive (transgender, trans woman, trans man, non-binary gender identity, genderqueer, and gender fluid) 5%. The results are meant to provide a reasonably balanced opinion of LGBTQ community members who are “out” and interacting with LGBTQ media and events.
- › Respondents were entered into a drawing for one of twenty \$50 prizes in cash or Amazon credit in recognition of their time to participate in the study.

U.S. RESPONDENT PROFILE N=3,703

UNWEIGHTED • SEE METHODOLOGY

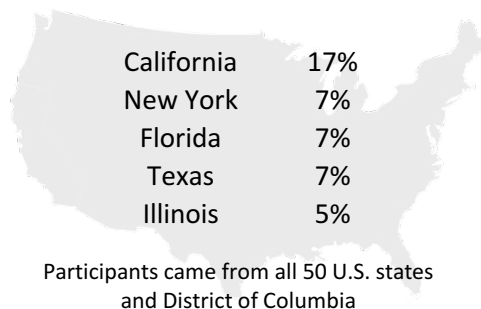
IDENTITY

Gay & Bisexual Men	63%
Lesbian & Bisexual Women	31%
Gender Expansive*	8%
Other	1%

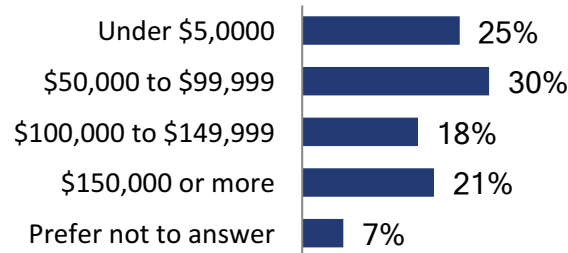
Multiple identities allowed, so the total exceeds 100%

*Gender Expansive include: Transgender, Trans Woman, Trans Man, Non-Binary, Genderqueer and/or Gender Fluid

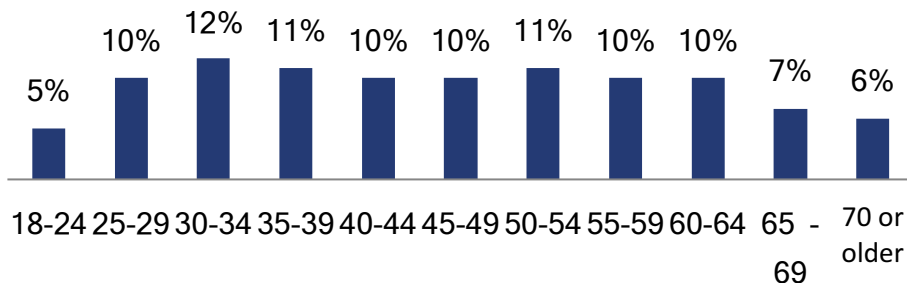
TOP STATES



INCOME



AGE



RELATIONSHIP

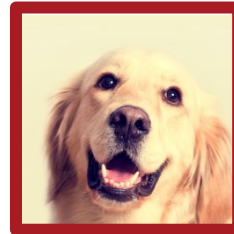
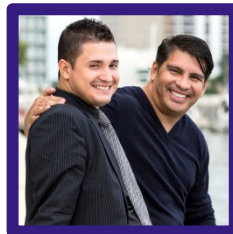
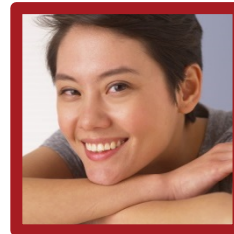
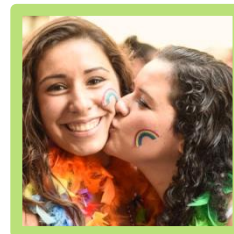
Single	31%
Married	34%
In a relationship and living with partner	15%
In a relationship but not living with partner	10%
Engaged to be married	3%
Civil union or domestic partner	2%

Other Single: Divorced 2%; Widow/Widower 2%; Other 1%



22nd Annual LGBTQ Tourism & Hospitality Survey
U.S. Overview Report | November 2017

LGBTQ TRAVEL BY THE NUMBERS

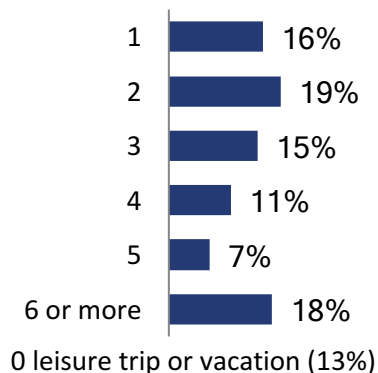


LGBTQ TRAVEL: On average, LGBTQ participants took 3.2 vacation or leisure trips and 1.4 business trips in the past 12 months. *In addition*, LGBTQs took an average of 2.3 trips primarily to visit family or friends in the past year.

PAST YEAR TRAVEL – NUMBER OF TRIPS



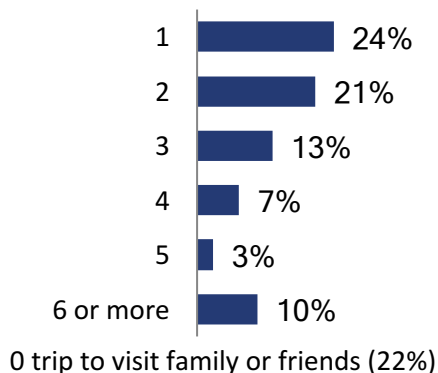
Primarily vacation or leisure trip

**3.2**

Avg. leisure trips or vacations taken in the past 12 months



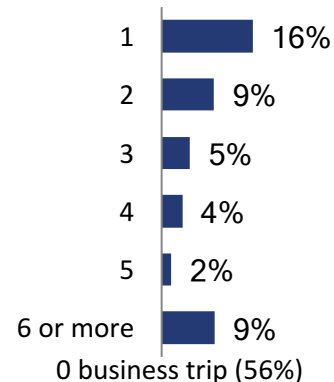
Visit family or friends as primary reason for travel

**2.3**

Avg. trips to visit family or friends in the past 12 months



Primarily business trip

**1.4**

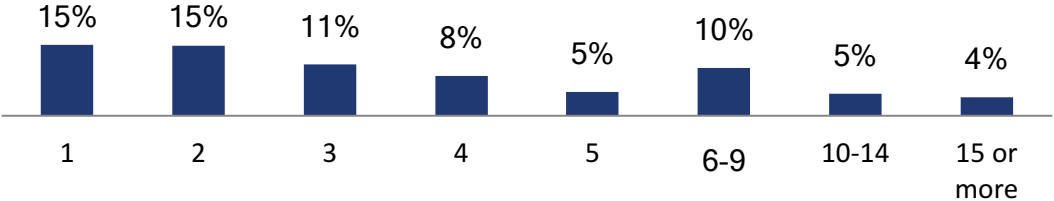
Avg. business trips in the past 12 months

LGBTQ TRAVEL: Compared to last year, the number of round-trip flights and nights in any paid accommodation are consistent.

PAST YEAR TRAVEL – FLIGHTS & NIGHTS



Total Number of Round-trip Flights

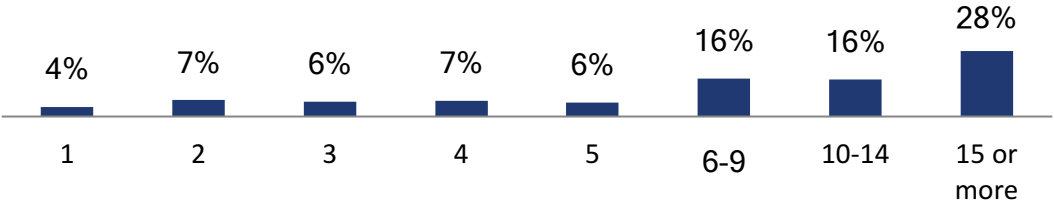


3.7

Avg. number of round trip flights taken in the past 12 months
0 round-trip flights taken (26%)



Total Number of Nights in Any Paid Accommodation



10.5

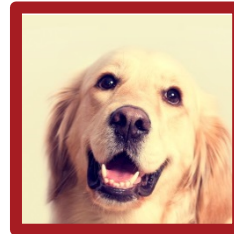
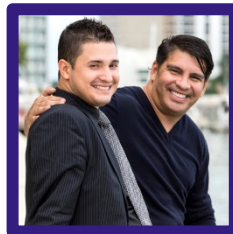
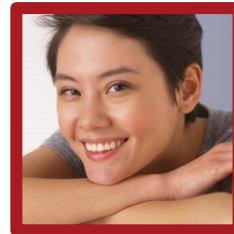
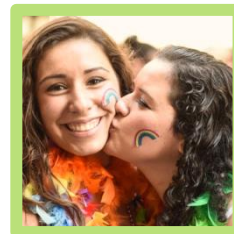
Avg. nights in paid accommodation in the past 12 months
0 nights in paid accommodation (10%)

Base: (Weighted) All LGBTQ n=3,633



22nd Annual LGBTQ Tourism & Hospitality Survey
U.S. Overview Report | November 2017

LGBTQ ROMANCE TRAVEL

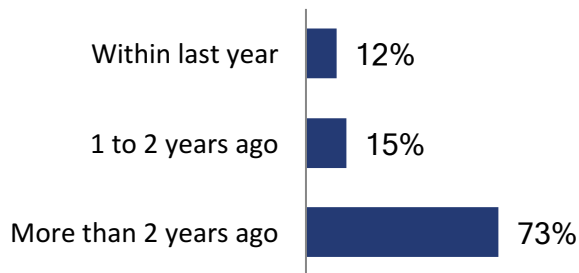


MARRIAGE & HONEYMOONS: 12% of married participants indicated marriage within the past year, slightly down from the year before (15%). CMI would expect the number of newly-wed LGBTQ couples to stabilize year to year as long-term same sex couples have tied the knot in the past decade. The most popular LGBTQ honeymoon destinations are Europe and beach destinations.

MARRIAGE & HONEYMOONS



You said that you were married.
How long ago did you marry?



Please write the destination you traveled to or plan to travel to on your honeymoon.

Top honeymoon destinations among those married within last year or those that are engaged to marry

Europe	25%
Hawaii	12%
California	9%
Caribbean	8%
Mexico	7%
Florida	7%
Cruise to any destination	6%
Other Destinations	26%

Base: (Weighted) All LGBTQ that are married n=1,220; All LGBTQ that married within past year or engaged to marry and wrote in an answer n=157

RELATIONSHIP & TRAVEL: 78% of those partnered have been with their partner/spouse for 5 or more years. “Just to have fun with partner” is the most important reason for LGBTQ couples to travel together, over romance and getting out of a rut at home.

RELATIONSHIP & TRAVEL



How long have you been with your partner or spouse as a couple?

Among those that are partnered



	Millennials	Gen X	Boomers
Less than one year	3%	2%	1%
1 to 4 years	37%	17%	7%
5 to 9 years	43%	29%	13%
10 or more years	17%	53%	79%



Here are four reasons you might travel with a partner or spouse. Please rank them in order of importance as reasons to go on a vacation with a partner or spouse.



Just to have fun with partner

1.5



Romantically connect with partner

2.4



To get out of our rut at home

2.9



Intellectually connect with partner

3.2

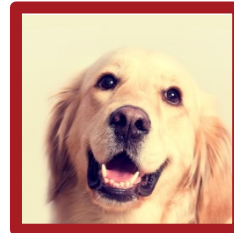
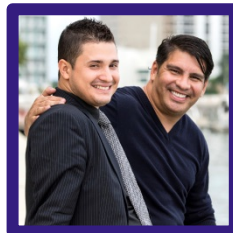
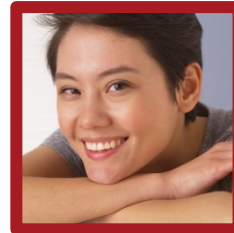
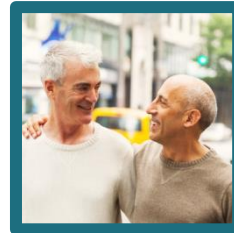
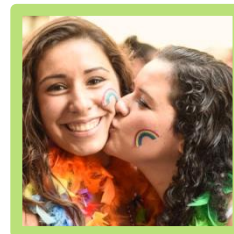
Average Ranking

Base: (Weighted) LGBTQ that are partnered Millennials n=544; Gen X n=713; Boomers n=704



22nd Annual LGBTQ Tourism & Hospitality Survey
U.S. Overview Report | November 2017

LGBTQ FAMILY TRAVEL



LGBTQ FAMILY TRAVEL: Gen X and Millennial women are most likely to have children under age 18 living at home. When traveling with children, if they had to pick one, LGBTQ parents would prefer child-friendly over LGBTQ-friendly in destination and accommodation selection. Compared to 2016, we saw a slight increase in those selecting an LGBTQ-friendly destination for family vacations, while hotels remained consistent.

LGBTQ FAMILY TRAVEL

Have children under age 18, living in my home full-time or part-time among...

	Millennials	Gen X	Boomers
Gay & Bisexual Men	2%	5%	1%
Lesbian & Bisexual Women	13%	32%	6%



If you had to pick one...
When traveling with your children, what is more important to you when choosing...



A Vacation Destination



LGBTQ-friendly

39%

61%

Child-friendly



A Hotel or Paid Accommodation



LGBTQ-friendly

36%

64%

Child-friendly



Base: All LGBTQ that have children under age 18 n=325

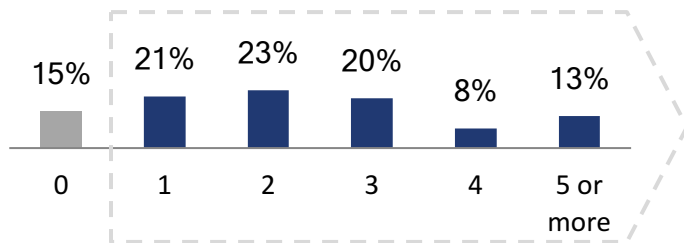
LGBTQ FAMILY TRAVEL: 85% of LGBTQ parents with children under age 18 have taken at least one trip with their children in the past year. Urban vacations and beach vacations were the most popular vacation types. Large theme resort park destinations also did well, considering their overall number compared to other types of destinations.

LGBTQ FAMILY TRAVEL



In the past 12 months, how many trips did you go on with your child or children?

Among All LGBTQ with Kids Under 18



2.2

Average Number of Trips Taken with Child(ren) in the past 12 months



What types of overnight vacations have you taken with your children in the past 12 months? (Please mark all that apply.)

Urban or city vacation	55%
Visit family as primary reason for travel	55%
Beach or beach town	54%
Resort town, small town or rural destination vacation	32%
Large theme resort/park (like Disney, Universal, etc.)	23%
Visit friends as primary reason for travel	17%
International vacation (outside of your country)	12%
Other type of vacation	9%

Base: All LGBTQ that have children under age 18 n=325; All LGBTQ with Children Under Age 18 and Went on at Least One Trip with Child/Children in the Past 12 Months n=277

LGBTQ FAMILY TRAVEL: LGBTQ multi-generation family travel should not be overlooked. 14% of all LGBTQ Baby Boomer participants have grandchildren, and 29% of all LGBTQ grandparents took their grandchildren on a vacation in the past year.

LGBTQ FAMILY TRAVEL

Baby Boomer Generation LGBTQs
That Have Grandchildren



17%

Baby Boomer
Lesbian & Bi Women

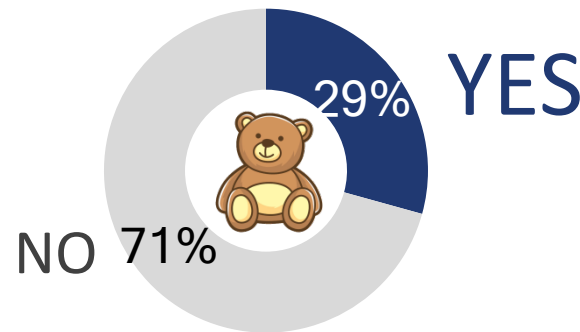
9%

Baby Boomer
Gay & Bi Men



In the past 12 months, did you go on a vacation with your grandchildren?

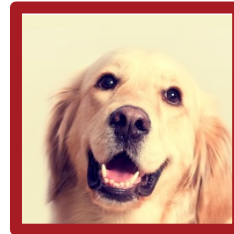
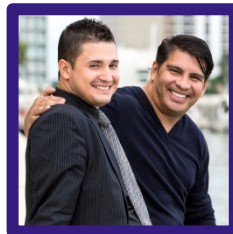
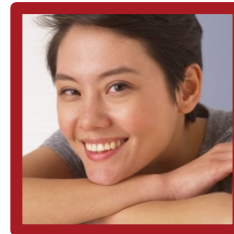
Among All LGBTQs That Have Grandchildren





22nd Annual LGBTQ Tourism & Hospitality Survey
U.S. Overview Report | November 2017

LGBTQ TRAVEL IN 2017



TYPE OF TRAVELER: LGBTQ travelers tend to be more moderate-price travelers, although there are some gender and generational differences. There was no change in travel type since the the 2016 report.

TYPE OF TRAVELER



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

TRAVELER TYPE	All LGBTQ	Gay & Bi Men	Lesbian & Bi Women	Gender Expansive	Millennials	Gen X	Boomers
5 - Luxury traveler	4%	5%	2%	0%	2%	3%	6%
4 - Moderate price traveler, with a little luxury	32%	36%	28%	21%	21%	39%	35%
3 - Moderate price travel	24%	25%	25%	16%	23%	25%	26%
2 - Budget traveler with an occasional splurge	29%	24%	34%	41%	39%	23%	26%
1 - Budget / economy traveler	11%	10%	11%	21%	15%	10%	8%

Base: (Weighted) All LGBTQ n=3,633; Gay & Bi Men n=2,242; Lesbian & Bi Women n=1,116; Gender Expansive n=275; Millennials n=1,183; Gen X n=1,203; Boomers n=1,247

INTERNATIONAL TRAVEL: American LGBTQs are active international travelers. 77% of LGBTQ participants reported having a valid passport (compared to 36% of U.S. general population; State Department). Among these passport holders, 53% used their passport in the past year to travel to another country.

INTERNATIONAL TRAVEL



Do you have a valid Passport?

Among All LGBTQ

77%

YES

23%



No



Did you use your Passport in the last 12 months for international travel?

Among those who have a valid passport

Yes, for travel to another country

53%

No, I did not travel to another country

47%



Base: (Weighted) All LGBTQ n=3,633; All LGBTQ that have valid passport n=2,797

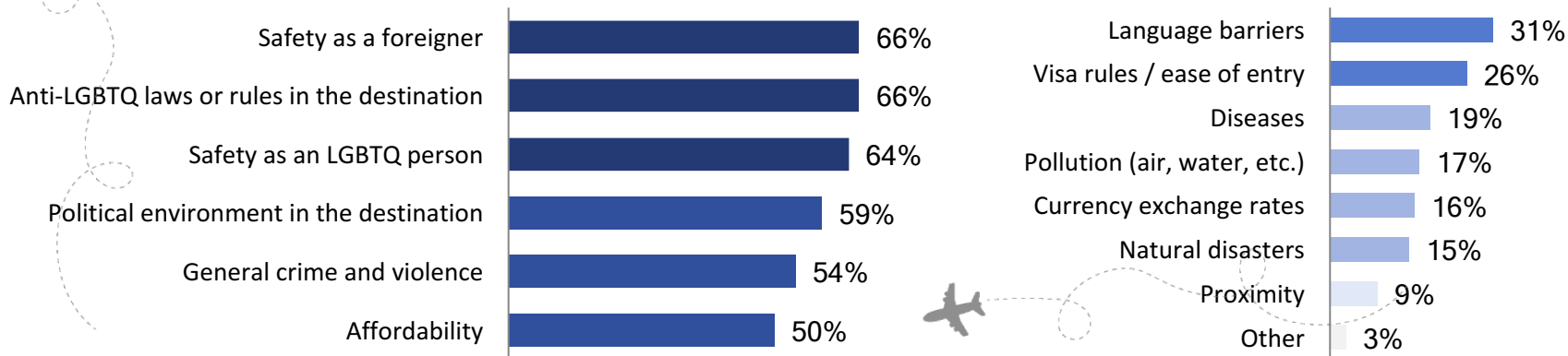
INTERNATIONAL TRAVEL: When asked about concerns when selecting an international travel destination, participants expressed mostly safety-related concerns as an LGBTQ individual as well as a foreigner. Political environment in the destination also has a influence in destination selection. Concerns such as language, natural disasters and currency rates were not large barriers to LGBTQ international travel.

INTERNATIONAL TRAVEL



What are the issues that concern you the most when selecting an international travel destination? (Please mark all that apply.)

Among All LGBTQ that have a valid passport and used it for international travel in the past year



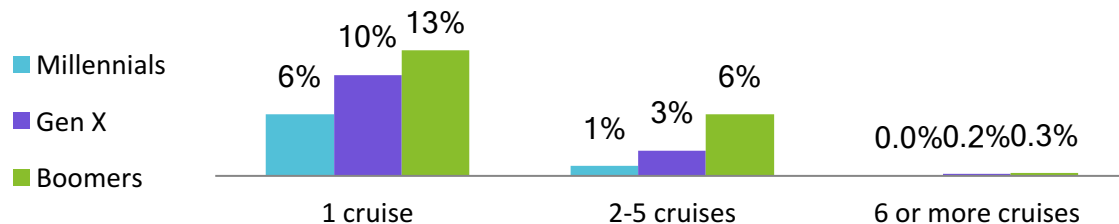
Base: (Weighted) All LGBTQ that have valid passport and used it for international travel in the past year n=1,531

CRUISE TRAVEL: 13% of LGBTQ participants reported taking at least one cruise in the past 12 months. Older LGBTQs, especially Baby Boomers, tend to take more cruise trips than younger generations.

CRUISE TRAVEL



How many cruises have you taken in the past 12 months of at least one night at sea?



Took at least one cruise in the past 12 months

Millennials	7%
Gen X	13%
Boomers	19%

Was it ... (please mark all that apply over the past 12 months)

	Millennials	Gen X	Boomers
A "mainstream" sailing	81%	71%	70%
An LGBTQ full-ship charter	7%	20%	22%
An LGBTQ group on a mainstream sailing	7%	11%	8%
None of the above	6%	1%	6%

Base: (Weighted) All LGBTQ Millennials n=1,183; Gen X n=1,203; Boomers n=1,247

NEGATIVE EXPERIENCE: 6% of all LGBTQ respondents had negative travel experience because of LGBTQ reasons. This number is significantly higher among gender expansive community members (16%). Workers in the tourism and hospitality industry should not only be informed about LGB and same-sex couple concerns, but need diversity training on issues important to gender expansive travelers.

NEGATIVE EXPERIENCE

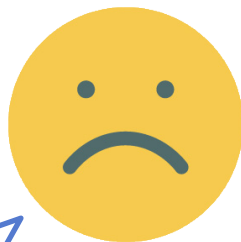
Q

Have you had any negative experience during travel because of LGBTQ reasons in the past 12 months?

I have had trouble with the TSA because of being transgender. They often have trouble deciding whether to mark me as male or female on their x ray machine and often if I am binding the machine thinks there's something on my chest and I have to get patted down.

We checked into a hotel recently and the desk clerk was insistent about trying to get my husband and I to switch room types from a room with one bed to a room with two. She just kept telling us "you know this room only has 1 bed, don't you need a room with 2 beds?" We did the hotel's brand headquarters and was told the hotel was a franchise and they would inform the manager.

Yes 6%



I had to switch around my flight for my wife and myself, to get her on my flight. I called to handle the situation, but the airline customer service rep refused to refer to my wife as such- and instead said my friend or girlfriend through the whole conversation, even when corrected. I filed a complaint with the airline, who, to my surprise, said their hands were tied and there was nothing to do.

Chased out of restroom and had security escort me out because I am too butch being in ladies restroom.

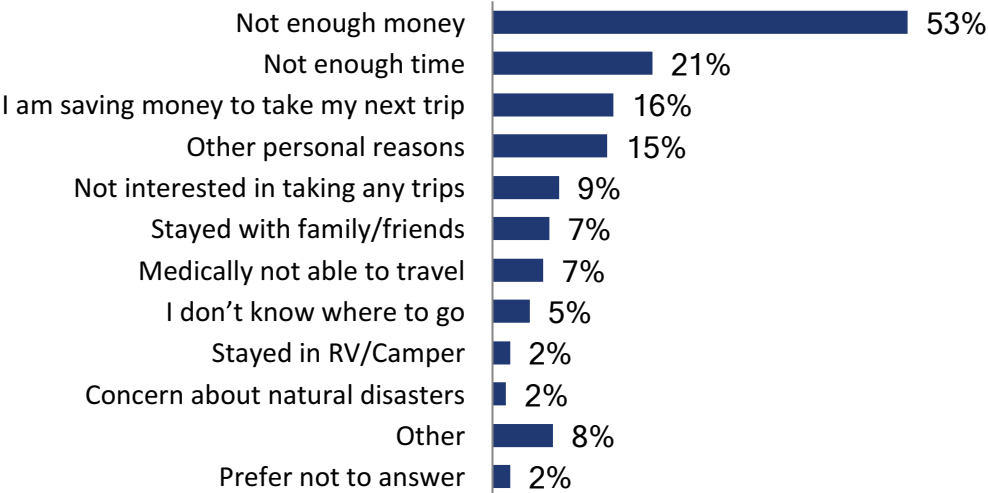
I was carrying a Pride Flag and a man came up to me and asked me to seek god so I wouldn't go to hell.

NON-TRAVELERS: 11% of all participants indicated that they didn't take any trips in the past 12 months that involved a hotel or paid accommodations stay. Money and time are the main reasons that kept them away from travel. Looking ahead, 55% of the non-travelers said that they plan to travel in the next 12 months.

NON-TRAVELERS



Why didn't you take any trips in the past 12 months that involved a hotel or paid accommodations stay?



Do you plan to take any trips in the next 12 months?

Among the non-travelers

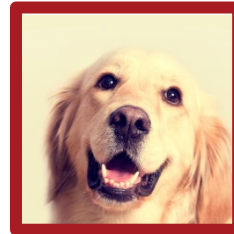
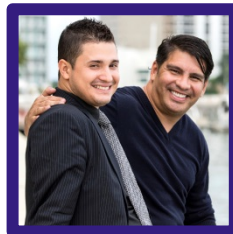
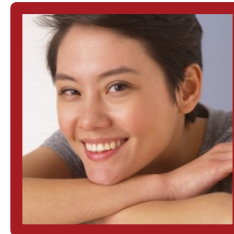
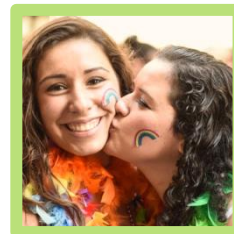


Base: All LGBTQ that have not stayed in a paid accommodation in the past 12 months
n=399



22nd Annual LGBTQ Tourism & Hospitality Survey U.S. Overview Report | November 2017

DESTINATION & HOTEL SELECTION



DESTINATION ATTRIBUTES: Scenic or natural beauty is the No. 1 destination attribute that LGBTQ travelers are looking for (60%), followed by LGBTQ friendliness (45%). Women (69%) and Baby Boomers (68%) trend higher for scenic/natural beauty, while men (50%) prefer known LGBTQ-friendly destinations. Millennials (43%) are most likely to enjoy food and restaurant offerings.

DESTINATION SELECTION



Of those listed, what are the top three attributes you look for when picking a destination for vacation?

Among all LGBTQs who spent at least one night in a paid accommodation in the past year:

DESTINATION ATTRIBUTES	All LGBTQ	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
Known for its scenic or natural beauty	60%	51%	69%	54%	59%	68%
Known to be LGBTQ-friendly	45%	50%	38%	44%	48%	42%
Known for its food and restaurants	37%	36%	37%	43%	36%	31%
Known as a relaxing place	37%	31%	42%	33%	41%	36%
Known for its arts and culture	34%	34%	34%	32%	30%	39%
Has diversity of people and cultures	32%	29%	33%	31%	30%	34%
Known as an exciting place	30%	35%	25%	40%	28%	21%
Known for its architecture	17%	23%	12%	16%	18%	18%
None of the above	1%	2%	1%	2%	1%	2%

Base: (Weighted) All LGBTQ n=3633; Gay & Bi Men n=1,969; Lesbian & Bi Women n=970; Millennials n=1,010; Gen X n=1,067; Boomers n=1,070

DESTINATION ACTIVITIES: Interesting and unique tourist attractions, historic attractions and interesting neighborhoods are the top destination activities that LGBTQ travelers look for. Outdoor activities are important for women (46%), while men (44%) are seeking out LGBTQ-specific activities. Of interest is that LGBTQ-friendly reputation was the #2 attribute for destination selection, but among activities, LGBTQ dropped to the #5 rank on this question.

DESTINATION SELECTION



Of those listed, what are the top three activities you look for when picking a destination for vacation?

Among all LGBTQs who spent at least one night in a paid accommodation in the past year:

DESTINATION ACTIVITIES	All LGBTQ	Gay & Bi Men	Lesbian & Bi Women	Millennials	Gen X	Boomers
Interesting and unique tourist attractions	63%	62%	65%	61%	65%	64%
Historical attractions	48%	49%	47%	43%	44%	56%
Interesting neighborhoods the city is known for	41%	42%	41%	42%	43%	39%
Outdoor activities (like hiking and biking)	38%	29%	46%	43%	40%	32%
Has LGBTQ-specific activities, nightlife or neighborhood	35%	44%	24%	38%	38%	27%
Art museums or local arts scene	27%	25%	30%	27%	23%	32%
Theater, concert or cultural performances	23%	24%	23%	23%	24%	24%
Unique or luxury shopping	8%	10%	7%	9%	9%	7%
None of the above	2%	2%	2%	2%	2%	3%





Base: (Weighted) All LGBTQ n=3633; Gay & Bi Men n=1,969; Lesbian & Bi Women n=970;
Millennials n=1,010; Gen X n=1,067; Boomers n=1,070

HOTEL SELECTION: Hotel location and value ranked as top motivators in LGBTQ travelers' hotel selection process, followed by low price and LGBTQ-friendly reputation. CMI has been tracking this trend for years, and LGBTQ-friendly ranking remained 4th, even with the changed political environment in the United States.

HOTEL SELECTION



When you shop for hotels, how would you rank the following motivators in your selection process? (Please drag and rank.)

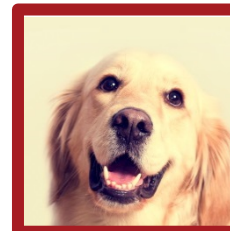
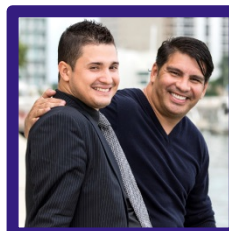
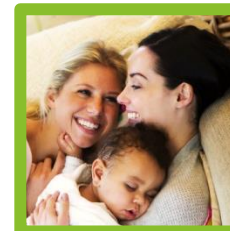
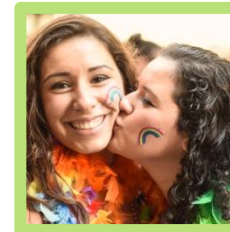
	Avg. Ranking
 Location of hotel in destination	2.0
 Value of price for hotel quality	2.1
 Low Price	3.4
 LGBTQ-friendly reputation	3.4
 Hotel customer loyalty program	4.0





22nd Annual LGBTQ Tourism & Hospitality Survey U.S. Overview Report | November 2017

DESTINATION RANKINGS 2017



Top U.S. Destinations | Leisure | Gay & Bisexual Men | 2017

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 & Bisexual Men)**

Rank	Destination	% Visited
1	New York City	22%
2	Las Vegas	16% - 19%
2	Los Angeles Metro Area	16% - 19%
2	San Francisco	16% - 19%
5	Chicago	14% - 15%
5	Ft. Lauderdale/Wilton Manors	14% - 15%
5	Washington, DC	14% - 15%
8	Palm Springs	12% - 13%
8	Miami/ South Beach	12% - 13%
10	New Orleans	10% - 11%
10	Orlando	10% - 11%
10	San Diego	10% - 11%

Rank	Destination	% Visited
Other Top Cities	Atlanta, Boston, Dallas, Denver, Key West/Florida Keys, Hawaii, Napa County, Philadelphia, Phoenix, Portland, Provincetown, Seattle, Sonoma County, Tampa/St. Petersburg	7% -9%
Other Top Cities	Austin, Baltimore, Charleston, Cleveland, Columbus, Detroit, Houston, Kansas City, Minneapolis, Nashville, Rehoboth Beach, Richmond, Sacramento, San Antonio, St. Louis, Sacramento	4% - 6%

Base: All Gay & Bisexual Men n=2,338

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. Note that percentages for most destinations dropped 1 to 2% from 2016 due to a difference in how the survey was administered and may or may not reflect a real drop in visitation. The small percentage drop seemed consistent across most destinations.

Top U.S. Destinations | Leisure | Lesbian & Bisexual Women | 2017

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 Lesbian & Bisexual Women)**

Rank	Destination	% Visited
1	New York City	15%
2	San Francisco	11% - 13%
2	Chicago	11% - 13%
2	Las Vegas	11% - 13%
2	Los Angeles Metro Area	11% - 13%
2	Washington, DC	11% - 13%
7	Boston	8% - 10%
7	Denver	8% - 10%
7	Orlando	8% - 10%
7	Seattle	8% - 10%

Rank	Destination	% Visited
Other Top Cities	Atlanta, Fort Lauderdale, Key West/Florida Keys, Napa County, Miami/South Beach, New Orleans, Palm Springs, Portland, Philadelphia, San Diego, Sonoma County, Tampa/St. Petersburg	6%-7%
Other Top Cities	Alaska, Asheville, Austin, Baltimore, Charleston, Columbus, Dallas, Detroit, Hawaii, Houston, Nashville, Phoenix, Pittsburgh, Provincetown, Sacramento, St. Louis, Rehoboth Beach	4-5%

Base: All Lesbian & Bisexual Women n=1,146

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. Note that percentages for most destinations dropped 1 to 2% from 2016 due to a difference in how the survey was administered and may or may not reflect a real drop in visitation. The small drop seemed consistent across most destinations.

Top U.S. Destinations | Business | U.S. LGBTQ | 2017



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 all LGBTQ)**

Rank	Destination	% Visited
1st Tier	New York City, Washington, DC	7+%
2nd Tier	Atlanta, Chicago, Dallas, Denver, Las Vegas, Los Angeles, San Francisco, Seattle	4% to 6%
3rd Tier	Boston, Houston, New Orleans, Orlando, Philadelphia, Phoenix, San Diego	3%

Base: All LGBTQ n=3,703
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 International Destinations | Leisure | U.S. LGBT Travelers | 2017



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 all LGBTQ USA participants).

Top Destination Among Men	% Visited
Canada (Any destination)	14%
Toronto	5%
Montreal	5%
Vancouver	4%
Mexico (Any destination)	13%
Puerto Vallarta	7%
Cancun	4%
Cabo San Lucas / La Paz	3%
Mexico City	3%

Other Top Destinations 3% or over Among Men	% Visited
Great Britain	9%
France	9%
Spain	7%
Germany	7%
Italy	6%
Netherlands / Holland	5%
Portugal	3%
Greece	3%
Japan	3%

Top Destination Among Women	% Visited
Canada (Any destination)	12%
Vancouver	4%
Toronto	3%
Niagara Falls Region	3%
Victoria	3%
Mexico (Any destination)	8%
Cancun	4%
Puerto Vallarta	3%
Other Top Destinations 3%+	
Great Britain	5%
France	5%
Italy	3%
Germany	3%

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 80,000 community-representative LGBTQ 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 LGBTQ research/sales/marketing/best practices corporate training and conference presentations.

Diversity procurement: Community Marketing, Inc. is an NGLCC-Certified LGBT Owned Business Enterprise and a U.S. Federal Contractor Verified Vendor.

For more information:

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



Community Marketing & Insights

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info@CommunityMarketingInc.com

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THANK YOU

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Community Marketing, Inc. is an NGLCC Certified LGBTQ-Owned Business Enterprise and a U.S. Federal Contractor Verified Vendor. IGLTA Member since 1993.





ABOUT CMI'S LGBTQ RESEARCH PRACTICE

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

Market research studies and resulting insights and action items are meant to help marketers understand the LGBTQ 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 LGBTQ 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 LGBTQ 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 LGBTQ. For example, CMI was able to recruit for projects needing 1,200 men living with HIV, 200 LGBTQ 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 LGBTQ 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 LGBTQ-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 LGBTQ community.

CMI'S PANEL CONSISTS OF OVER 80,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:

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

IN THE UNITED STATES, THE PANEL HAS SIGNIFICANT NUMBERS IN EVERY LGBTQ SEGMENT

- Over 20,000 lesbian and bisexual women
- Over 30,000 gay and bisexual men
- 3,000 transgender community members
- 7,000 bisexual community members
- 5,000 with income over \$150,000
- 5,000 with income below \$25,000
- 18,000 representing LGBTQ communities of color
- 20,000 LGBTQ 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 LGBTQ parents with a child under 18 living at home
- 10,000 legally married same-sex couples
- Experience with LGBTQ youth research (in partnership with an institution and IRB approval)

CMI'S LGBTQ 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 LGBTQ loyalty. LGBTQ 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 LGBTQ community. The trainings may include topics ranging from a basic introduction to the LGBTQ community, research, case studies and marketing opportunities...to diversity/sensitivity training best practices...to sales training and customer service.

LGBTQ Community Survey and Community Marketing are registered trademarks of Community Marketing, Inc.

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



CONTACT US

Visit www.CMI.info, email 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*

LGBTQ Panel 2017-2018

Community Marketing & Insights (CMI) is uniquely positioned in the global LGBTQ marketplace, with 25 years of dedicated experience conducting LGBTQ consumer surveys, focus groups, in-depth interviews, advisory boards, consulting services and training. We skillfully assist our clients with strategies, tactics and cost-effective plans based on research results and case study experience.

CMI's PANEL CONSISTS OF OVER 80,000 SELF-IDENTIFYING LGBTQ COMMUNITY MEMBERS, WHICH INCLUDES:



60,000

LGBTQ Panelists
in the USA



7,500

LGBTQ Panelists
in Canada
(English + French Speaking)



4,500

LGBTQ Panelists
in China



Capabilities in the
UK, Germany,
Australia and other
countries



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

20,000+

Lesbian and
bisexual women



30,000+

Gay and
bisexual men



3,000

Transgender
community
members



7,000

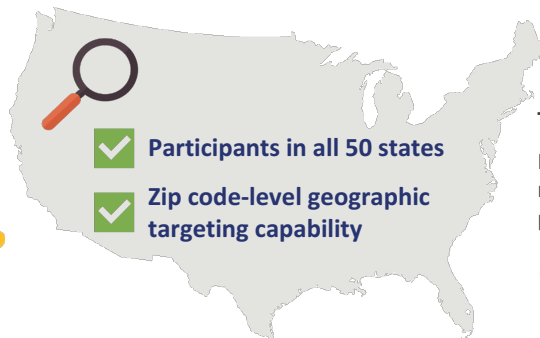
Bisexual
community
members



5,000 With an HHI
Over \$150,000

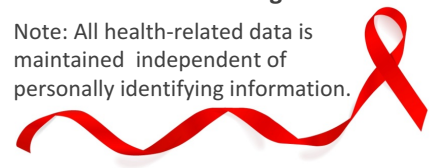


5,000 With an HHI
Below \$25,000



Thousands of men living with HIV

Note: All health-related data is
maintained independent of
personally identifying information.



18,000

Representing
the LGBTQ
community
of color



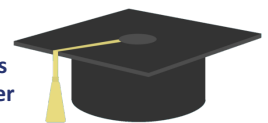
20,000

LGBTQ
Millennials



10,000

With a master's
degree or higher



4,000

LGBTQ parents with
a child under 18
living at home



10,000

Legally married
same-sex couples



LGBTQ youth research
experience

(in partnership with an
institution and IRB approval)

