

*In partnership with*



# 23<sup>rd</sup> Annual LGBTQ Tourism & Hospitality Survey

**USA Overview Report  
December 2018**



## 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: NYC & Company, VisitBritain, Argentina Tourism Office, West Hollywood Travel + Tourism Board, Travel Portland, Las Vegas Convention & Visitors Authority, Visit Raleigh, Visit Philadelphia, Greater Fort Lauderdale CVB, Tourism Toronto, Visit Florida, Hawaii Tourism Authority, Hyatt Hotels, W Hotels, Kimpton Hotels, Wells Fargo Bank, Aetna, Target Brands, Hallmark, DirecTV, Johnson & Johnson, WNBA, American Cancer Society, AARP, Kaiser Family Foundation, Freddie Mac, 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 our proprietary research panel of 90,000+ LGBTQ consumers** through partnerships with more than 300 LGBTQ publications, websites, blogs, social media, apps, events, influencers 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 November and December 2018.
- › This report focuses on United States data for 5,709 self-identified members of the LGBTQ community, including 3,567 gay and bisexual men, 1,708 lesbian and bisexual women, and 434 transgender and gender-expansive community members.
- › All 50 states were represented. The top five states were California 16%, New York 9%, Texas 7%, Florida 6%, and Illinois 5%.
- › Generation breakdowns were 1,773 Millennial+, 1,641 Generation X, and 2,295 Baby Boomers.
- › In order to balance the opinion by gender and generation, results were weighted and 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, events and organizations. These results do not necessarily represent LGBTQ community members who are not out or not interacting within the LGBTQ community.

## RESEARCH DESIGN

### 25 YEARS OF LGBTQ INSIGHTS

- › This report is designed to help inform the planning and communications of destinations, hotels and travel-related suppliers that outreach to the community through LGBTQ media, events, and sponsorships.
- › 95% of the participants came from a random sample of the Community Marketing & Insights LGBTQ research panel, with 5% of the participants from email/social media distribution from the following national LGBTQ media: *Autostraddle, Curve Magazine, Damron and GayCities.*
- › The CMI panel was built over a 25 year period with the partnership of over 300 LGBTQ media, organizations 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.
- › In this report, some percentages may not add up to 100% due to rounding or multiple selections allowed.
- › CMI's annual LGBTQ Tourism & Hospitality Survey is a public report produced for 23 years by Community Marketing & Insights (CMI). Results and charts may be used by any organization as long as credited to Community Marketing & Insights. The goal of the research is to support and grow the LGBTQ travel industry.

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# LGBTQ TRAVEL BY THE NUMBERS



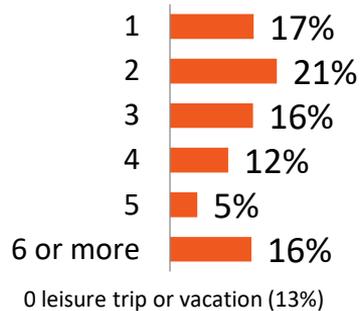
**LGBTQ TRAVEL BY THE NUMBERS:** On average, LGBTQ participants took 3.1 vacation or leisure trips and 1.5 business trips in the past 12 months. *In addition*, participants took an average of 2.2 trips primarily to visit family or friends in the past year. These numbers were consistent with 2017 results.

Past Year Travel – Number of Trips

Primarily vacation or leisure trip



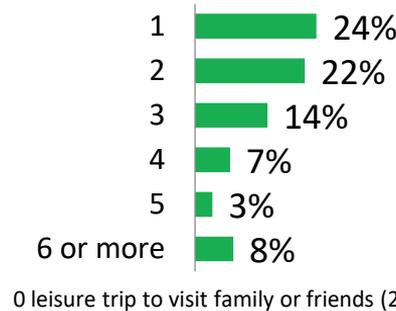
Avg. trips taken in the past 12 months



Visit family or friends as primary reason for travel



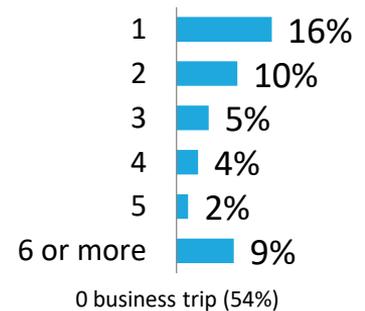
Avg. trips taken in the past 12 months



Primarily business trip



Avg. trips taken in the past 12 months



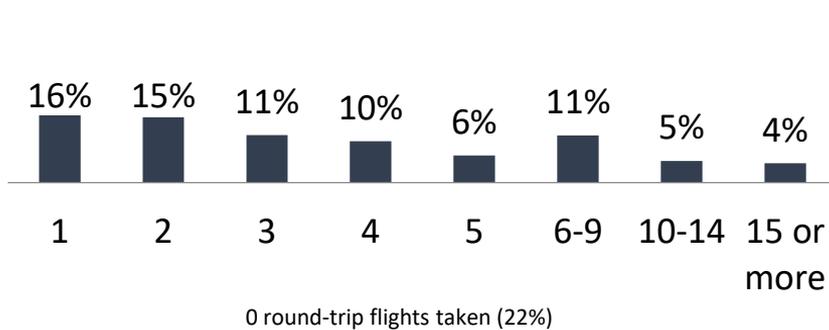
**LGBTQ TRAVEL BY THE NUMBERS:** However, when asked about the total number of round-trip air flights and the total number of nights in a paid accommodation, participants indicated an increase compared to 2017 (increased just over 5%).

Past Year Travel – Flights & Nights

Total Number of Round-trip Flights



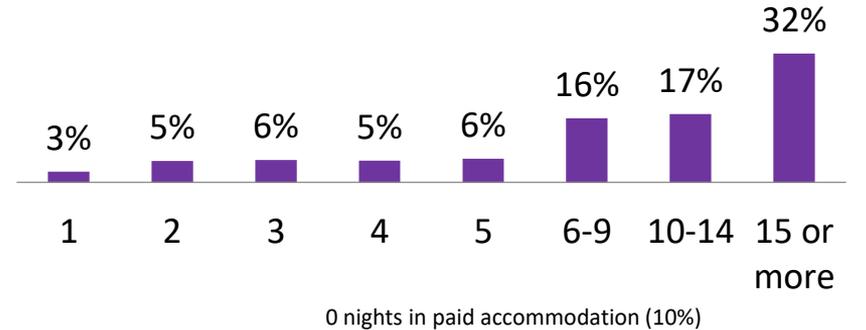
Avg. number of round trip flights taken in the past 12 months



Total Number of Nights in Any Paid Accommodation



Avg. nights in paid accommodation in the past 12 months



**PRICE POINT FOR LGBTQ TRAVELERS:** LGBTQ travelers tend to be more moderate-price travelers, although there are some gender and generational differences. Few participants see themselves as pure luxury or budget travelers, however larger percentages are willing to partially embrace those travel identities. There was no change in self-identified travel type since the 2017 report.

### 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%	3%	3%	2%	4%	6%
4 - Moderate price traveler, with a little luxury	33%	38%	29%	22%	21%	38%	39%
3 - Moderate price travel	22%	24%	25%	18%	23%	25%	23%
2 - Budget traveler with an occasional splurge	30%	26%	33%	34%	41%	26%	22%
1 - Budget / economy traveler	10%	8%	10%	24%	14%	6%	9%

Base: All LGBTQ n=5,709; Gay & Bi Men n=3,567; Lesbian & Bi Women n=1,708; Gender Expansive n=434; Millennials+ n=1,773; Gen X n=1,641; Boomers n=2,295

**LGBTQ AIR TRAVELERS:** Among LGBTQ survey participants who took at least one flight in the past year, the vast majority are members of at least one frequent flyer program. Airline loyalty is near equally split between the major domestic carriers. Among those who belong to a frequent flyer program, 69% indicated belonging to more than one program, and 45% belong to three or more.

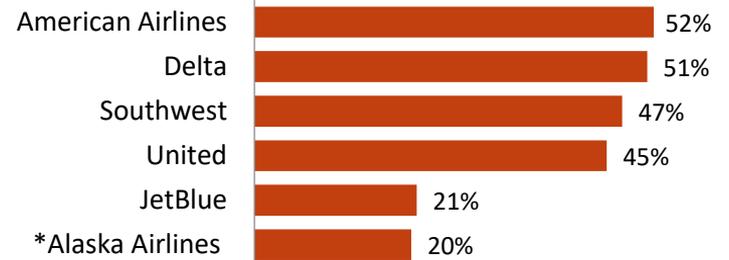
**Frequent Flyer / Airline Rewards Programs**  
**Among All LGBTQ that have taken at least one round-trip flight in the past year**

**78%** Of those taking at least one flight belong to at least one Airline Frequent Flyer or Airlines Rewards Program

**40%** Hold a credit card connected to or assisting in earning miles in an Airline Frequent Flyer Program



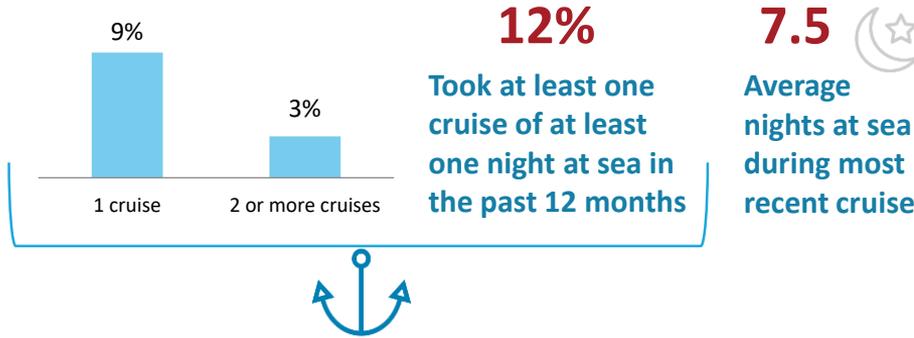
**In which Airline Frequent Flyer Programs are you a member?**  
 Please mark all that apply.  
 % of those who belong to any program:



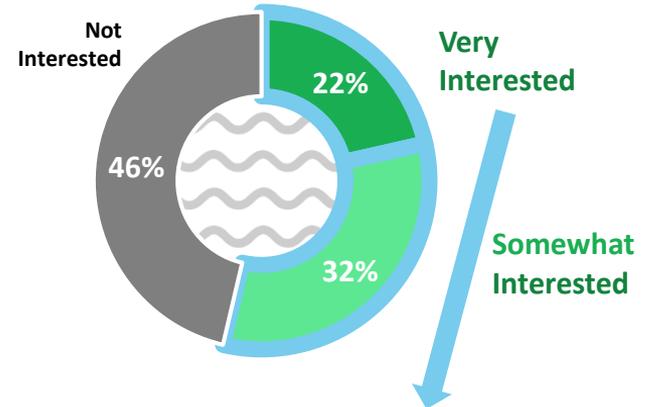
British Airways	6%	Air Canada	3%
Frontier	5%	Singapore	1%
Virgin Atlantic	5%	Qantas	1%
Lufthansa/Swiss/Austrian	3%	Other	8%

\*Alaska Airlines: including acquired Virgin America  
 Base: All LGBTQ who have taken at least one round-trip flight in the past year n=4,444;  
 Those who are members of frequent flyer programs n=3,497

**How many cruises did you take in the past 12 months, of at least one night at sea?**  
**Among All LGBTQ Travelers**

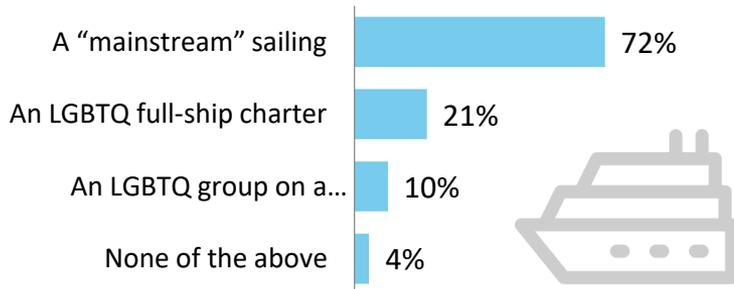


**How interested are you in taking a cruise in the next 12 months?**  
**Among All LGBTQ Travelers**



**What type of cruise are you interested in taking? (Please mark all that apply over the next 12 months.)**

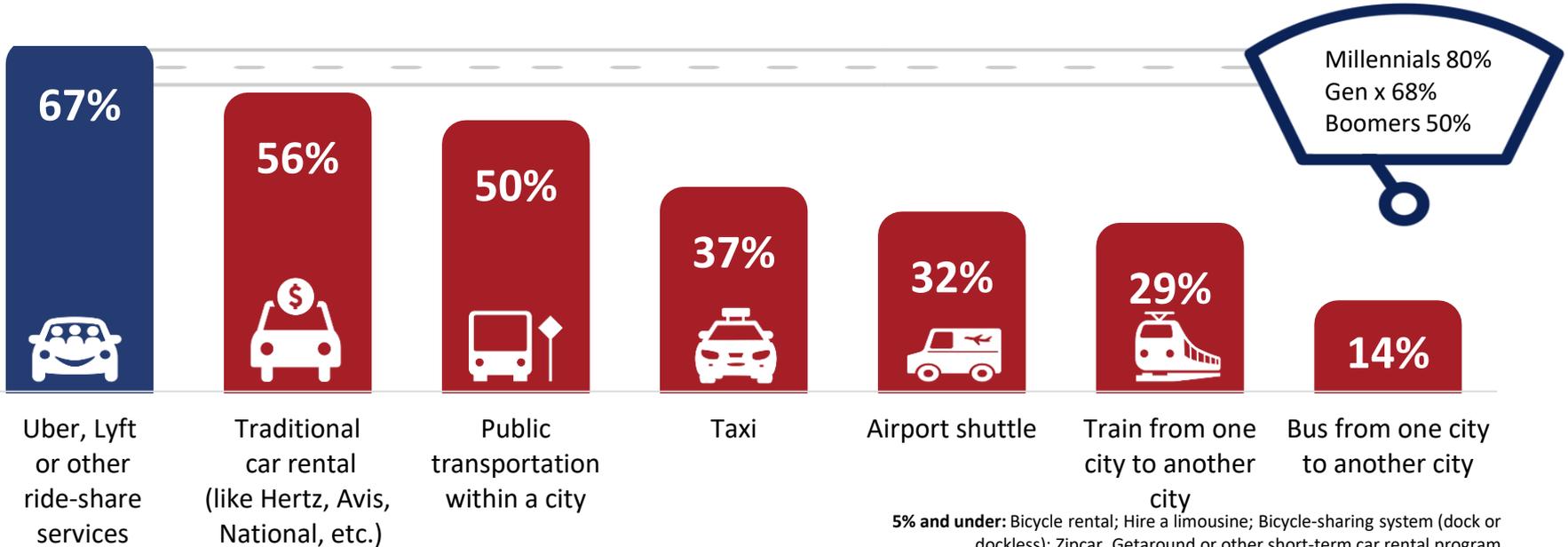
A "mainstream" sailing	60%
An LGBTQ full-ship charter	55%
An LGBTQ group on a mainstream sailing	41%
None of the above	3%



Base: All LGBTQ Travelers n=5,402

**GROUND TRANSPORTATION:** The chart shows the popularity of ride-share services like Uber and Lyft while traveling, at the expense of car rental and taxi. While percentages using ride-share services are higher among Millennials, the number of LGBTQ Baby Boomers now using these services is quite high.

**In the past 12 months, what types of transportation have you used/purchased when away from home on vacation?  
Among All LGBTQ Travelers**



5% and under: Bicycle rental; Hire a limousine; Bicycle-sharing system (dock or dockless); Zipcar, Getaround or other short-term car rental program

Base: Please mark all that apply question. All LGBTQ Travelers n=5,402

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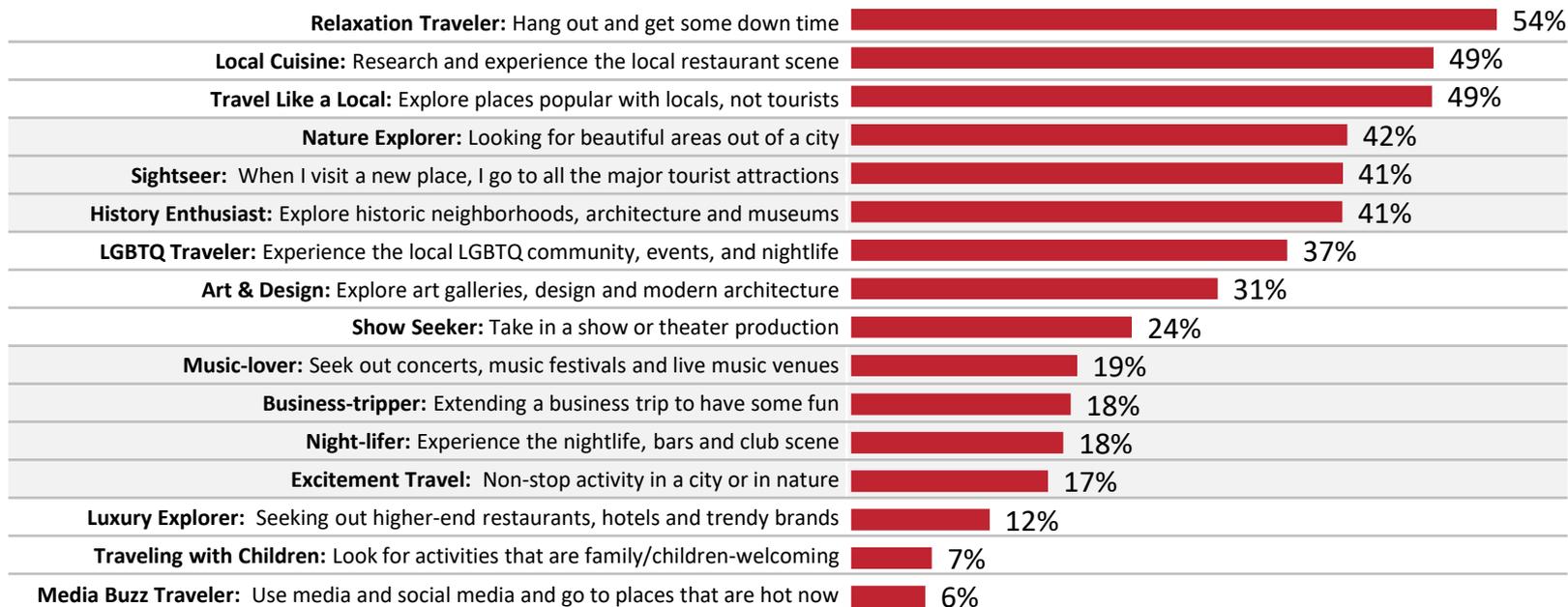
# TRAVEL MOTIVATIONS



**TYPE OF TRAVELER:** This question shows overall travel priorities within the LGBTQ community. However, CMI finds that in custom destination research, these percentages can vary substantially if the same question is asked about a specific destination, for example, if it is known for outdoor adventure or for theater.

Looking only at your trips in the past year, what type of traveler do you consider yourself to be? (Please mark all that apply.)

Among All LGBTQ



**TYPE OF TRAVELER BY GENDER:** There are important differences when we look at these travel priorities by gender. Travel marketers must understand that L, G, B and T are not one “group” moving in one direction. For example, Nature Explorer was higher among women. LGBTQ Traveler was more important among men and gender-expansive participants. Night-lifer and Showseeker were more important for men.

Looking only at your trips in the past year, what type of traveler do you consider yourself to be? (Please mark all that apply.)

	Gay & Bi Men	Lesbian & Bi Women	Gender Expansive
Relaxation Traveler	54%	56%	49%
Local Cuisine	49%	50%	42%
Travel Like a Local	47%	51%	44%
Nature Explorer	35%	49%	41%
Sightseer	47%	37%	28%
History Enthusiast	42%	40%	43%
LGBTQ Traveler	45%	28%	36%
Art & Design	32%	29%	32%
Show Seeker	27%	20%	19%
Music-lover	17%	21%	24%
Business-tripper	21%	16%	17%
Night-lifer	27%	9%	14%
Excitement Travel	19%	15%	10%
Luxury Explorer	15%	9%	8%
Traveling with Children	3%	11%	5%
Media Buzz Traveler	7%	6%	5%

Base: Lesbian & Bi Women n=1,704; Gender Expansive n=432

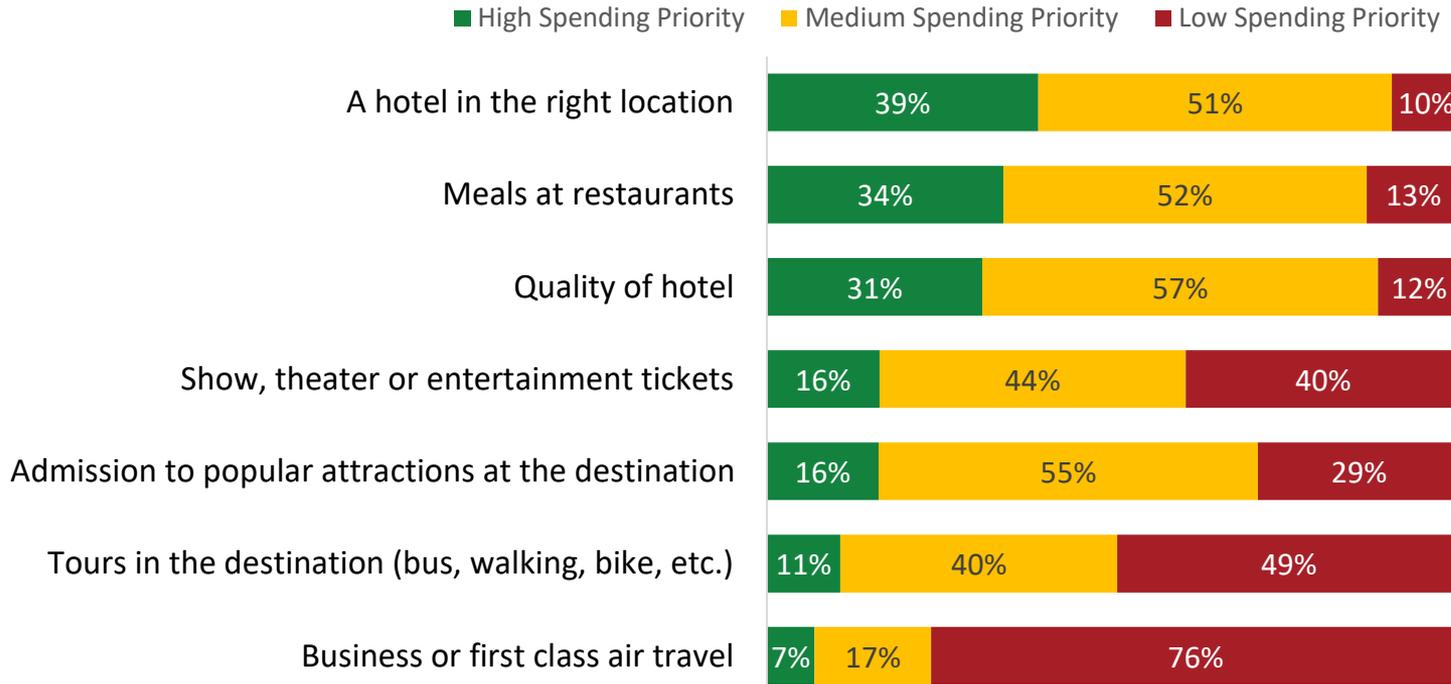
**TYPE OF TRAVELER BY GENERATION:** There are also differences when we look at these travel priorities by generation. Millennials had higher percentages for Travel Like a Local, Excitement Traveler, LGBTQ Traveler and Night-lifer. Generation X had the highest business travel identity. In general, Baby Boomers underperformed on nearly all the identities.

Looking only at your trips in the past year, what type of traveler do you consider yourself to be? (Please mark all that apply.)

	Millennials+	Gen X	Boomers
Relaxation Traveler	55%	57%	51%
Local Cuisine	53%	49%	45%
Travel Like a Local	54%	49%	43%
Nature Explorer	46%	41%	38%
Sightseer	43%	42%	39%
History Enthusiast	41%	40%	43%
LGBTQ Traveler	42%	37%	31%
Art & Design	34%	29%	29%
Show Seeker	22%	25%	24%
Music-lover	22%	19%	17%
Business-tripper	19%	23%	13%
Night-lifer	28%	17%	9%
Excitement Travel	24%	18%	8%
Luxury Explorer	11%	14%	10%
Traveling with Children	5%	12%	4%
Media Buzz Traveler	11%	5%	3%

When you travel for vacation, what are your biggest spending priorities? Or from your observations, what do you think that you spend more or less on, than the average traveler?

Among All LGBTQ Travelers



**Some Demographic Differences**

The response was relatively consistent across gender

Millennials were less likely than older generations to prioritize money for hotel location and hotel quality

Spending money on meals was the top spending priority for Millennials

Baby Boomers had higher rates of spending for show tickets and tours

Base: Varies

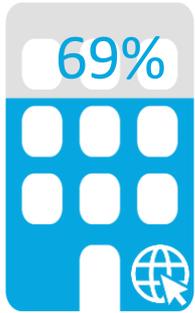
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# HOTELS AND PAID ACCOMMODATIONS

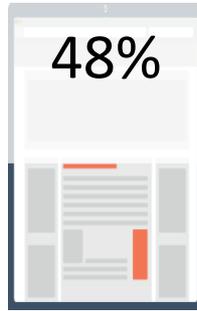


**BOOKING HOTELS:** Compared to two years ago when we asked a similar question, booking methods were relatively unchanged. Of note are the generational and gender differences for using Airbnb or a similar site.

**In the past 12 months, how have you purchased a hotel room or paid accommodation?  
(Please mark any that apply over the past year.)  
Among All LGBTQ Travelers**



Hotel's website / direct with individual hotel or brand's website

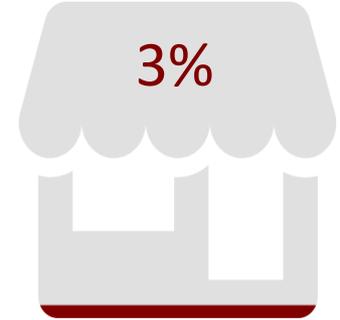


Online travel agency / multiple hotel booking website (e.g. Expedia, Booking.com, Priceline, etc.)



Airbnb or similar site

Millennials	53%	Women	42%
Gen X	36%	Men	34%
Boomers	24%	Gender Expansive	28%

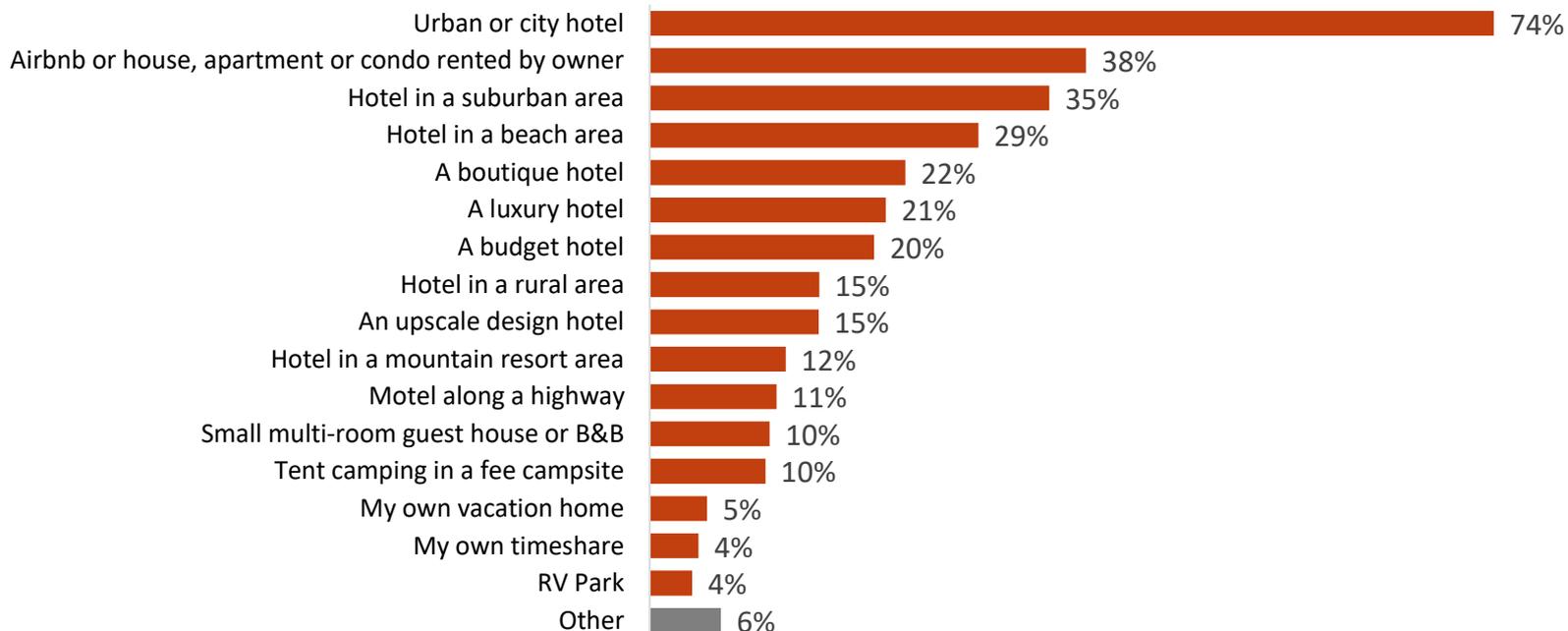


Retail travel agency (location in town, retail store, etc.)

**TYPES OF HOTELS:** Gay and bisexual men had the highest urban hotel stay rate at 79% vs. 70% for lesbian and bisexual women. Men had higher rates for luxury hotels, design hotels and boutique hotels, which are more often found in cities. Lesbian and bisexual women tended to be more varied in the accommodation choices, higher for Airbnb (previous slide) and higher rates for outdoor options like camping and RVs.

### In the past 12 months, in which type of hotel or paid accommodations did you stay at least one overnight?

#### Among All LGBTQ Travelers



I did not stay in a hotel or paid accommodation in the past 12 months. (4%)

Base: All LGBTQ Travelers n=5,402

**HOTELS AND LGBTQ REPUTATION:** This question set shows that staying in a hotel brand that has a positive LGBTQ reputation is important. However, most LGBTQ community members feel that today most major hotel brands are LGBTQ-welcoming. This is a positive statement about the hotel industry, but it makes it more challenging for brands to distinguish themselves only through LGBTQ messages.

**Do you agree or disagree with these statements about hotels?**  
**Among All LGBTQ Travelers**

*“I tend to stay at hotel brands that I know are LGBTQ-welcoming.”*

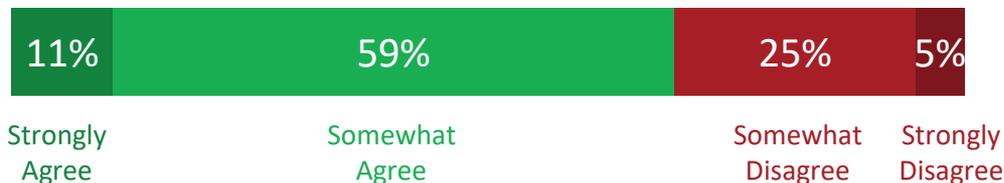
**69%**  
**Agree**



**31%**  
**Disagree**

*“Today, all the major hotel brands are LGBTQ-welcoming.”*

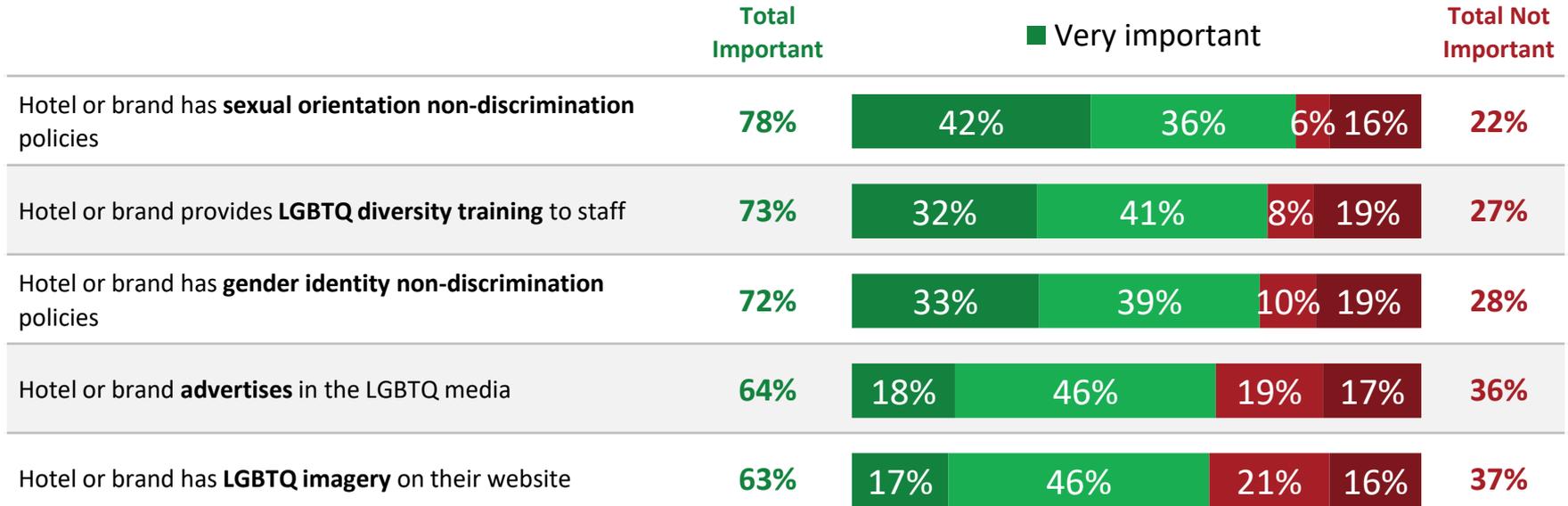
**70%**  
**Agree**



**30%**  
**Disagree**

**HOTELS AND LGBTQ REPUTATION:** This question helps determine the programs and outreach methods that are most important for a hotel to build a positive LGBTQ-welcoming reputation. All the strategies were viewed as important, and notably, internal policies and training were considered to be as important as outreach strategies.

**Which of these programs and outreach methods are important to you, when considering booking a hotel, or joining a hotel loyalty program?  
Among All LGBTQ Travelers**



Base: All LGBTQ Travelers n=5,402

**HOTEL LOYALTY PROGRAMS:** Just over half of LGBTQ participants who spent a night in a paid accommodation in the past year belong to a hotel loyalty program. Of those, Hilton and Marriott are by far the most popular.

### Hotel Loyalty Rewards Programs

Among All LGBTQs who have stayed at least one night in a hotel or any paid accommodation in the past year

**54%** Are members of at least one hotel loyalty rewards program



In which hotel loyalty/rewards programs are you a current member?  
Please mark all that apply.  
% of those who belong to any program:



**3%-8%:** La Quinta Returns (8%); Omni Select Guest (5%); Radisson Rewards (5%); Preferred Hotels & Resorts / I Prefer Hotel Rewards (5%); Club Carlson (4%)

**Under 3%:** Le Club Accor Hotels ; Leading Hotels of the World / Leaders Club; Small Luxury Hotels of the World / INVITED; Sonesta Travel Pass; Stash Hotel Rewards

Base: All LGBTQ who have stayed at least one night in a hotel or any paid accommodation in the past year n=5,062; Those are members of hotel loyalty rewards programs n=2,800

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### DESTINATIONS



**TYPES OF DESTINATIONS BY GENDER:** This question demonstrates the significant differences in preferred destinations within the LGBTQ community, when broken out by gender. For example, men were more likely than women to be urban travelers and beach travelers. Women were more likely than men to be outdoor adventure travelers and mountain travelers.

**Think back to all the trips you took in the past 12 months. How would you describe the destination or destinations in which you traveled to? (Please mark all that apply for the past year.)**

	All Travelers	Gay & Bi Men	Lesbian & Bi Women	Gender Expansive
 Big city / urban destination	66%	72%	60%	61%
 A destination with many historical attractions	43%	46%	41%	36%
 Beach resort or community	37%	41%	35%	25%
 A place known for outdoor adventure or activities	37%	32%	42%	38%
 A destination known to be LGBTQ popular	36%	45%	28%	29%
 A warm weather destination because it was cold at home	26%	31%	22%	16%
 Mountain resort or community	22%	20%	24%	19%
 Island destination	18%	21%	15%	11%
 Theme park destination	11%	12%	9%	8%
Other or none of the above	8%	7%	8%	14%

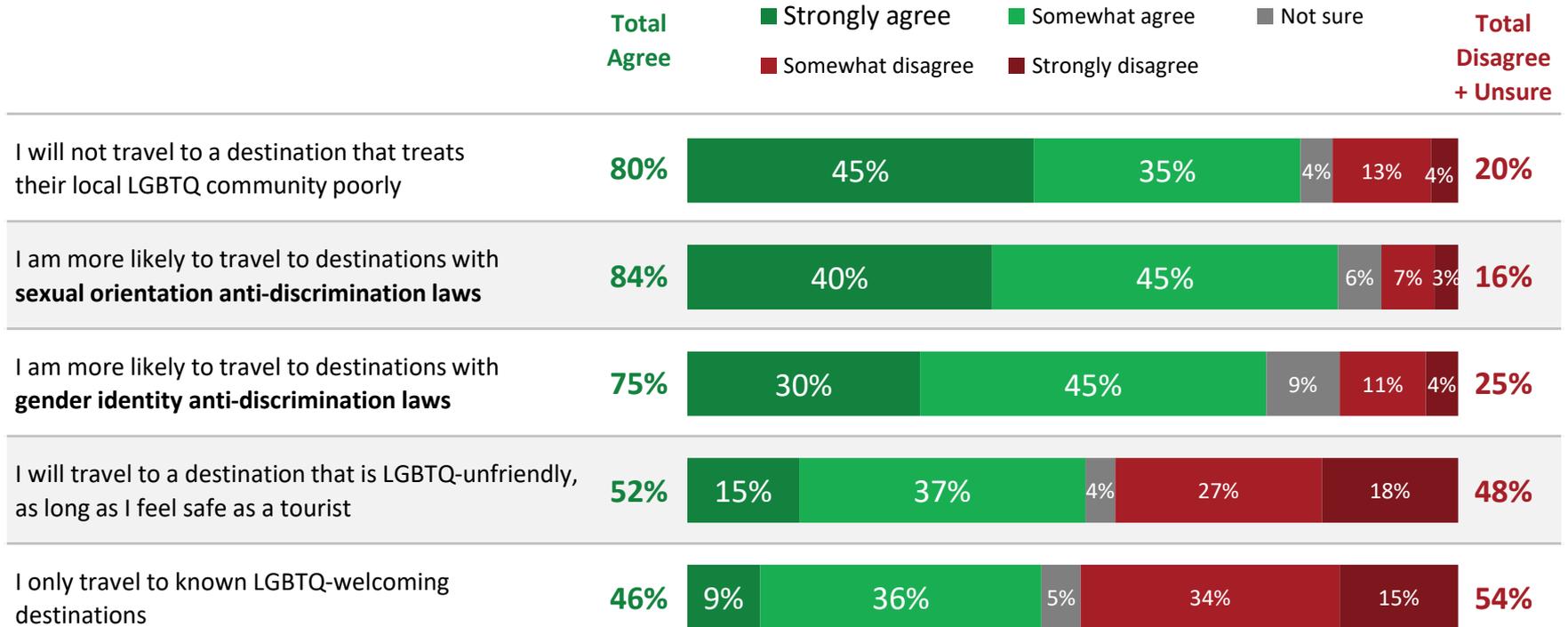
Base: All LGBTQ Travelers n=5,402;  
Gay & Bi Men n=3,361; Lesbian & Bi Women n=1,644; Gender Expansive n=397

**TYPES OF DESTINATIONS BY GENERATION:** This question demonstrates the differences in preferred destinations within the LGBTQ community, when broken out by generation. For example, Millennials were more likely to be both urban travelers as well as outdoor travelers. Baby Boomers were least concerned about LGBTQ-popular destinations.

**Think back to all the trips you took in the past 12 months. How would you describe the destination or destinations in which you traveled to? (Please mark all that apply for the past year.)**

	All Travelers	Millennials+	Gen X	Boomers
 Big city / urban destination	66%	75%	66%	56%
 A destination with many historical attractions	43%	43%	45%	42%
 Beach resort or community	37%	32%	42%	38%
 A place known for outdoor adventure or activities	37%	42%	39%	30%
 A destination known to be LGBTQ popular	36%	39%	38%	32%
 A warm weather destination because it was cold at home	26%	24%	28%	26%
 Mountain resort or community	22%	20%	24%	22%
 Island destination	18%	14%	19%	19%
 Theme park destination	11%	12%	13%	7%
Other or none of the above	8%	7%	7%	9%

**Do you agree or disagree with these statements about vacation destinations?  
Among All LGBTQ Travelers**



Base: All LGBTQ Travelers n=5,402

## Top U.S. Destinations | Leisure | Gay & Bisexual Men | 2018

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

Rank	Destination	% Visited
1	New York City	23%
2	Las Vegas	14% - 16%
2	Los Angeles Metro Area	14% - 16%
2	San Francisco	14% - 16%
5	Chicago	12% - 13%
5	Ft. Lauderdale/Wilton Manors	12% - 13%
5	Orlando	12% - 13%
5	Palm Springs	12% - 13%
5	Washington, DC	12% - 13%
10	Miami/ South Beach	10% - 11%
10	New Orleans	10% - 11%
10	San Diego	10% - 11%

Rank	Destination	% Visited
Other Top Cities	Atlanta, Boston, Dallas, Denver, Key West/Florida Keys, Hawaii, Philadelphia, Phoenix, Portland OR, Provincetown, Seattle, Tampa/St. Petersburg	7% -9%
Other Top Cities	Asheville, Austin, Baltimore, Charleston, Cleveland, Charlotte, Columbus, Detroit, Houston, Kansas City, Louisville, Madison, Milwaukee, Minneapolis, Napa County, Nashville, Ogunquit, Pittsburgh, Portland ME, Raleigh/Durham/Chapel Hill, Rehoboth Beach, Reno/Lake Tahoe, Richmond, Salt Lake City, Saugatuck, San Antonio, Santa Fe, St. Louis, Savannah, Sacramento, Sonoma County	3% - 6%

Base: All Gay & Bisexual Men n=3,567

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 | Lesbian & Bisexual Women | 2018

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

Rank	Destination	% Visited
1	New York City	17%
2	Las Vegas	10% - 12%
2	Los Angeles Metro Area	10% - 12%
2	San Francisco	10% - 12%
2	Washington, DC	10% - 12%
6	Boston	8% - 9%
6	Chicago	8% - 9%
6	Denver	8% - 9%
6	Orlando	8% - 9%
6	Philadelphia	8% - 9%
6	Portland, OR	8% - 9%
6	Seattle	8% - 9%

Rank	Destination	% Visited
Other Top Cities	Atlanta, Baltimore, Fort Lauderdale, Hawaii, Miami/South Beach, New Orleans, Palm Springs, Phoenix, San Diego, Tampa/St. Petersburg	6%-7%
Other Top Cities	Albuquerque, Asheville, Austin, Charleston, Charlotte, Cleveland, Columbus, Dallas, Detroit, Kansas City, Key West/Florida Keys, Houston, Madison, Milwaukee, Minneapolis, Napa County, Nashville, Pittsburgh, Portland ME, Provincetown, Raleigh/Durham/Chapel Hill, Richmond, Reno/Lake Tahoe, Sacramento, Santa Fe, Savannah, St. Louis, Sonoma County, Rehoboth Beach	3%-5%

Base: All Lesbian & Bisexual Women n=1,708

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. LGBTQ | 2018

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

Rank	Destination	% Visited
1 <sup>st</sup> Tier	New York City, Washington, DC	7% to 8%
2 <sup>nd</sup> Tier	Atlanta, Boston, Chicago, Dallas, Las Vegas, Los Angeles, Philadelphia, San Francisco, Seattle	4% to 6%
3 <sup>rd</sup> Tier	Austin, Baltimore, Denver, Ft. Lauderdale / Wilton Manors, Houston, Miami / South Beach, Minneapolis, Nashville, New Orleans, Orlando, Phoenix, San Diego	2% to 3%

Base: All LGBTQ n=5,709

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 | 2018

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

Top Destination Among Men	% Visited
<b>Canada (Any destination)</b>	<b>14%</b>
Toronto	5%
Montreal	5%
Vancouver	4%
<b>Mexico (Any destination)</b>	<b>12%</b>
Puerto Vallarta	7%
Cancun	4%
Mexico City	3%

3% or over Among Men	% Visited
Great Britain	8%
France	7%
Spain	5%
Germany	5%
Italy	5%
Netherlands / Holland	4%
Portugal	3%
Japan	3%
Thailand	3%
Australia	3%
Puerto Rico	3%

Top Destination Among Women	% Visited
<b>Canada (Any destination)</b>	<b>12%</b>
Vancouver	4%
Toronto	4%
Montreal	3%
<b>Mexico (Any destination)</b>	<b>8%</b>
Cancun	4%
Puerto Vallarta	3%
<b>Other Top Destinations 3%+</b>	
Great Britain	6%
France	4%
Italy	4%
Netherlands	3%
Ireland	3%

## 23<sup>rd</sup> Annual LGBTQ Tourism & Hospitality Survey

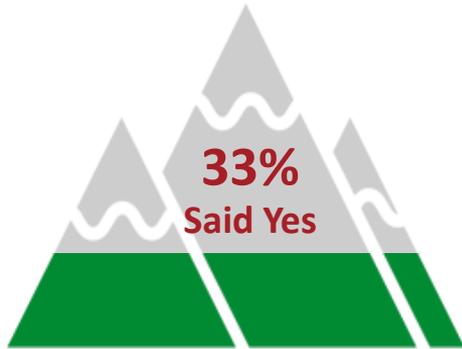
### A Few More LGBTQ Travel Topics



**NATIONAL PARK VISITS:** Calculating National Park visits is difficult for many reasons. Many in the LGBTQ community live in and visit cities such as New York, Washington DC, Philadelphia and San Francisco that contain National Parks and Monuments, and may well visit them (but not record the visit on a question like below). LGBTQ visitation could be much higher than indicated on this question.

**Visiting National Parks & Monuments  
Among All LGBTQ Travelers**

**Did you go to any National Parks or Monuments  
in the past 12 months for a daytrip or overnight?**



**Please tell us which parks you visited.**

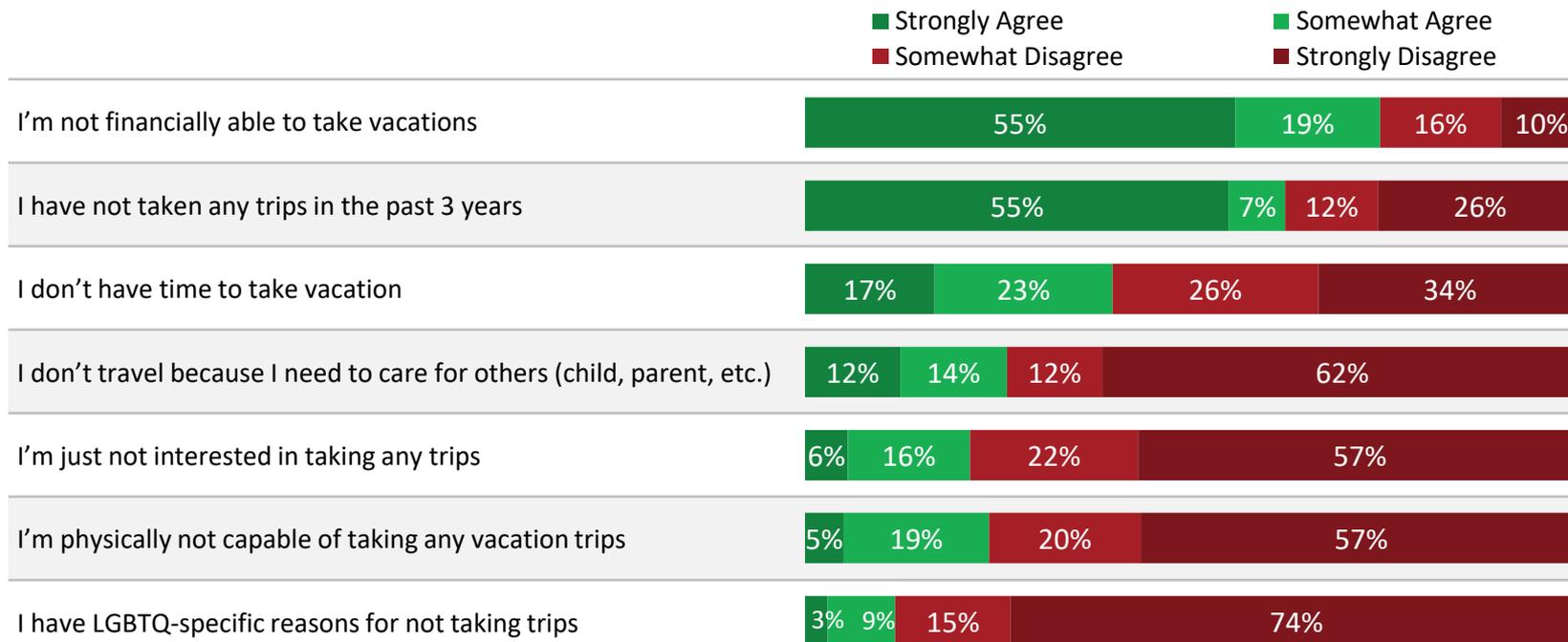
**Top 12 Non-Urban National Parks  
% of those who indicated yes**

Grand Canyon National Park	7%
Yosemite National Park	7%
Joshua Tree National Park	6%
Rocky Mountain National Park	5%
Zion National Park	4%
Great Smokey Mountains National Park	4%
Yellowstone National Park	4%
Acadia National Park	3%
Olympic National Park	3%
Shenandoah National Park	3%
Arches National Park	3%
Mount Rainier National Park	3%

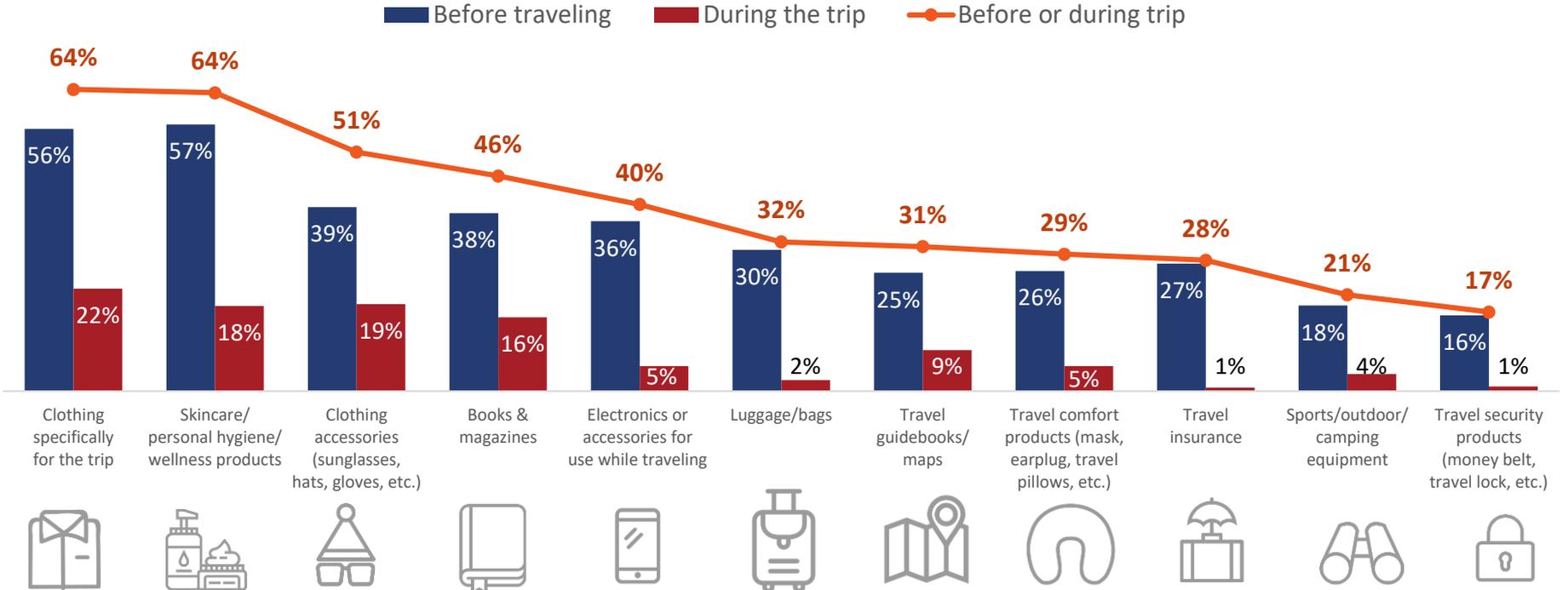
**Write-in  
exercise**

Base: All LGBTQ Travelers n=5,402  
Urban parks did receive many mentions but not included in the write-in calculation.

**You indicated that you have not taken any trips in the past 12 months.  
To what degree do you agree or disagree with the following statements?  
Among 307 LGBTQ Non-Travelers Defined as Taking No Trips, No Hotels Stays and No Flights**

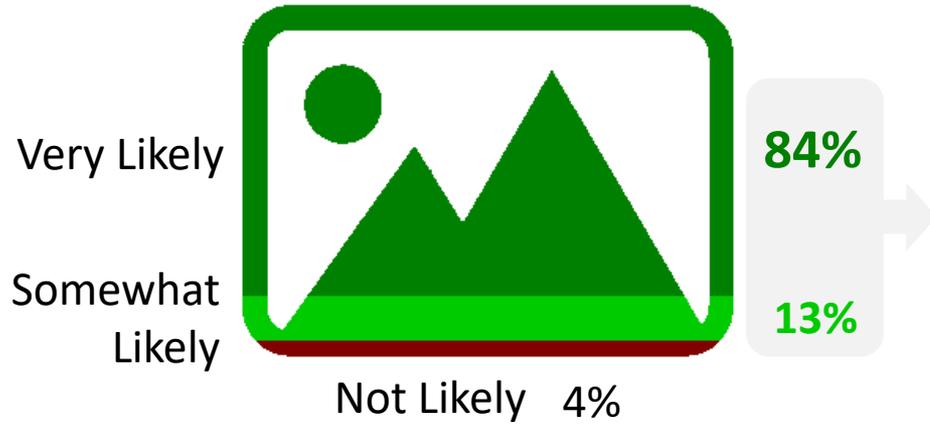


For your most recent vacation trip, what types of products did you purchase in preparation for the trip or while on the trip?  
 (Please mark all that apply.)  
 Among All LGBTQ Travelers



Base: All LGBTQ Travelers n=5,402

**When traveling on a personal trip, how likely are you to capture videos/photos with a smart phone and/or camera?  
Among All LGBTQ Travelers**



**How would you rank the reasons you capture these videos/images?  
Among Those Likely to capture videos/photos**

Rank	#1	#2
To store to remember the trip in the future	51%	19%
To post to social media while I am on vacation	31%	22%
To send to friends or family while I am on vacation	14%	31%
To personally show to people when I get home	12%	23%
To print and frame for a table, or to hang on a wall	3%	11%

Base: All LGBTQ Travelers n=5,402

## 22nd Annual LGBTQ Tourism & Hospitality Survey

*CMI cannot ask every question,  
every year.*

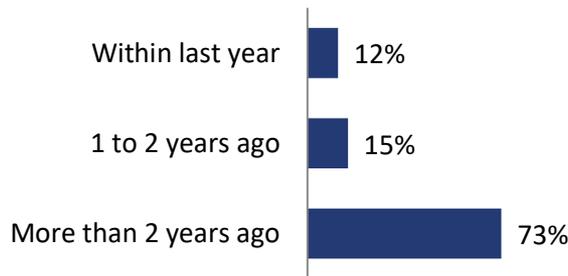
*Following are some highlights from  
last year's report to help round out  
the understanding of  
LGBTQ travelers.*



**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. For more information about LGBTQ weddings, see the 2018 special study on the CMI website.

## 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%	<b>53%</b>	<b>79%</b>

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

Average Ranking

**1.5**



Romantically connect with partner

**2.4**



To get out of our rut at home

**2.9**



Intellectually connect with partner

**3.2**

**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
<b>Gay &amp; Bisexual Men</b>	2%	5%	1%
<b>Lesbian &amp; Bisexual Women</b>	13%	<b>32%</b>	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



Child-friendly



A Hotel or Paid Accommodation



LGBTQ-friendly



Child-friendly



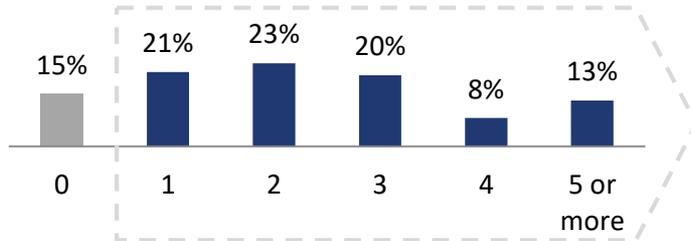
Base: All LGBTQ that have children under age 18 n=325

**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%

**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**



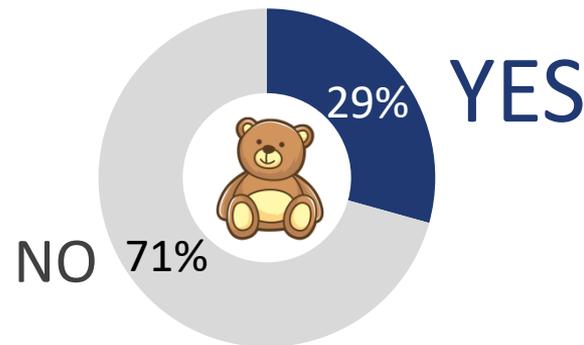
**17%**  
Baby Boomer  
Lesbian & Bi Women

**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



Base: Baby Boomer Lesbian & Bi Women n=326; Baby Boomer Gay & Bi Men n=857; All LGBTQ that have grandchildren n=215

**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?

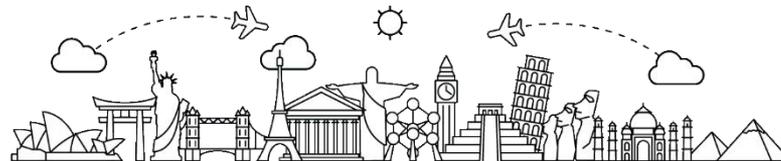
Among those who have a valid passport

Yes, for travel to another country

53%

No, I did not travel to another country

47%



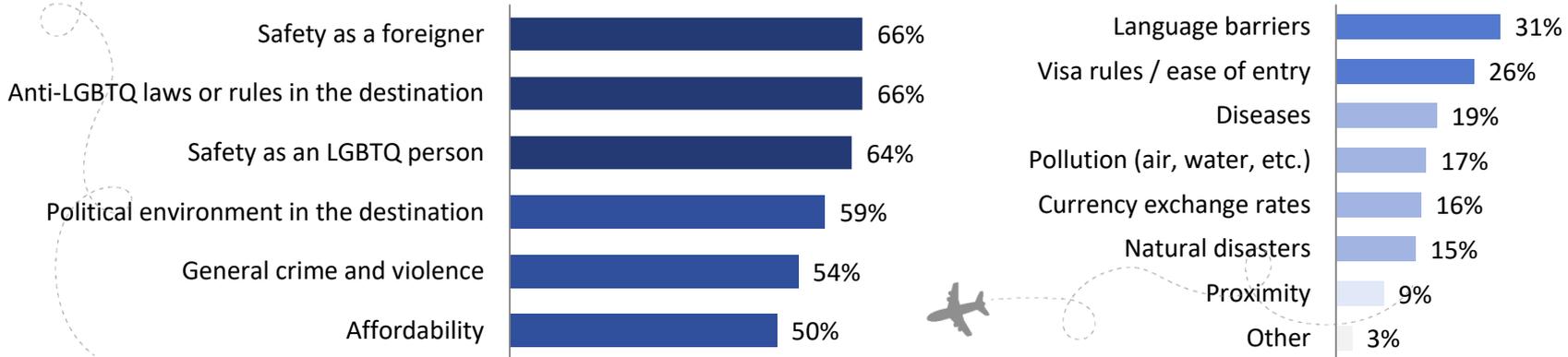
Base: (Weighted) All LGBTQ n=3,633; All LGBTQ that have valid passport n=2,797

**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 an 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

**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%	<b>69%</b>	54%	59%	<b>68%</b>
Known to be LGBTQ-friendly	45%	<b>50%</b>	38%	44%	48%	42%
Known for its food and restaurants	37%	36%	37%	<b>43%</b>	36%	31%
Known as a relaxing place	37%	31%	<b>42%</b>	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%	<b>56%</b>
Interesting neighborhoods the city is known for	41%	42%	41%	42%	43%	39%
Outdoor activities (like hiking and biking)	38%	29%	<b>46%</b>	43%	40%	32%
Has LGBTQ-specific activities, nightlife or neighborhood	35%	<b>44%</b>	24%	38%	38%	27%
Art museums or local arts scene	27%	25%	30%	27%	23%	<b>32%</b>
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 4<sup>th</sup>, 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



# THANK YOU



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@LGBTQinsights



Member since  
1993

## LGBTQ Research Panel 2019

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 LGBTQ 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**



- Participants in all 50 states
- Zip code-level geographic targeting capability

Thousands of men living with HIV

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



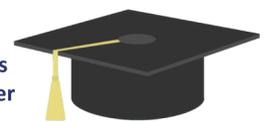
**18,000**  
Representing  
the LGBTQ  
community  
of color



**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)



# LGBTQ Research and Corporate Training

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

 TARGET	 Better Homes and Gardens REAL ESTATE	 WNBA	 Hallmark Cards	 DIRECTV	 WELLS FARGO
 GILEAD	 Johnson & Johnson	 HOLOGIC® The Science of Sure	 RADIESSE® A NATURAL LOOK THAT LASTS	 OraSure Technologies	 aetna®
 NEW YORK LIFE	 esurance® an Allstate company	 Florida Blue In the pursuit of health	 iHeart MEDIA	 VIACOM®	 DigitasLBi
 MillerCoors® A MOLSON COORS COMPANY	 ABSOLUT® Country of Sweden VODKA	 E. & J. Gallo Winery	 BRIDGESTONE	 JONES LANG LASALLE®	 TELUS
 CIRQUE DU SOLEIL	 travelocity®	 Argentina	 JNTO Japan National Tourism Organization	 JAL	 HAWAIIAN AIRLINES.
 Marriott starwood Hotels and Resorts	 HYATT	 KIMPTON® HOTELS & RESTAURANTS	 HAWAII TOURISM AUTHORITY	 VISITFLORIDA.	 LAS Vegas CONVENTION AND VISITORS AUTHORITY
 Penn UNIVERSITY OF PENNSYLVANIA	 JOHNS HOPKINS UNIVERSITY	 CU NY THE CITY UNIVERSITY OF NEW YORK	 Planned Parenthood® Act. No matter what.	 American Cancer Society®	 NORTHSTAR MEMORIAL GROUP Care, Comfort and Plan
 AARP® Real Possibilities	 United States Census Bureau	 Freddie Mac We make home possible®	 CDC CENTERS FOR DISEASE CONTROL AND PREVENTION	 U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT	 FDA
 nielsen	 qualtrics.	 Ipsos	 GfK	 ICF INTERNATIONAL	 C+R RESEARCH

# LGBTQ Market Research:

## *There is a difference!*

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LGBTQ research is meant to help marketers understand the LGBTQ community and make educated decisions about strategies and tactics to reach them.

Community Marketing & Insights (CMI) leverages our own proprietary panel to generate the valid data that our clients depend on. As an LGBTQ-founded and operated company, we understand the LGBTQ community's unique life experience. And because we have been serving clients for over two decades and have already conducted over 300 LGBTQ-specific research projects, we have the professional experience needed to deliver actionable results and recommendations.

### **CMI'S PROPRIETARY PANEL**

Community Marketing & Insights (CMI) has recruited for our proprietary research panel over the past 25 years by partnering with over 300 LGBTQ media, organizations, events, social media and influencers throughout the USA, Canada, the UK, Germany, Australia, China and beyond. The panel is highly representative of LGBTQ consumers who interact with LGBTQ community organizations and media. Our panelists come from diverse sources, allowing for broad research projects or targeted segments within LGBTQ.

CMI research is trusted by—and frequently quoted in—*New York Times*, *USA Today*, *Wall Street Journal*, *Forbes*, *Newsweek*, *U.S. News & World Report*, *Los Angeles Times*, *Chicago Tribune*, *Miami Herald*, *Ad Week*, *Christian Science Monitor*, NPR, CBS News, CNN, eMarketer, Mashable, Reuters, Associated Press and many others. CMI's research is considered the definitive resource for insights into the LGBTQ community.

### **LGBTQ PANEL DIVERSITY IS IMPERATIVE, BECAUSE THERE IS NO "LGBTQ MARKET"**

Community Marketing & Insights emphasizes that there is no "gay market," just as there is no single "Asian market." The LGBTQ 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 LGBTQ will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBTQ will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

*Note: General market surveys that may include a very small subset of "LGBT responses" just scratch the surface of the diverse and varied of opportunities marketers can enjoy if properly explored and understood.*

### **CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS**

CMI has conducted hundreds of LGBTQ-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 90,000 qualified and active LGBTQ consumers—the largest of its kind, by far. Our Annual LGBTQ 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.

*Note: Without access to this enormous resource of qualified LGBTQ 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 LGBTQ (see below) through a small sample. CMI fields surveys of 1,000+ responses. You might see some research with small samples, but they lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make an assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Miami? Generalities and sweeping statements about "the LGBTQ market" based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.*

## **GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH**

For over two decades, CMI has produced the most consistent, longest-running series of LGBTQ 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 LGBTQ-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.

*Note: 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 research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

*Note: 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 LGBTQ 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 LGBTQ market intelligence, however, and the cumulative 60+ years of LGBTQ-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.

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

## **WE ARE TRUSTED. WHY THIS IS IMPORTANT:**

Community Marketing, Inc., founded in 1992, pioneered LGBTQ consumer research. Because our company is LGBTQ-operated, and well known in the community, we have earned the recognition and trust of our survey panelists. LGBTQ consumers recognize that we use research data to build corporate relationships that ultimately lead to social progress, better conditions for LGBTQ employees, and more sensitive communications.

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBTQ-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 LGBTQ-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBTQ-Owned Business Enterprise.

CMI is involved in the LGBTQ 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 LGBT 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.