

CMI's 2008-09 LGBT Tourism Study was developed in partnership with



Key findings from Community Marketing's 13th Annual LGBT Tourism Study 2008 have been compiled from responses among self-identified LGBT consumers who read LGBT publications, visit LGBT websites, and attend LGBT events. With over 4,500 responses, this study polls more respondents than any other LGBT tourism survey, and offers valuable insights about consumers who may be reached through LGBT-dedicated marketing initiatives.

In addition to our annual Tourism Study, CMI produces online surveys, focus groups, field studies and customer satisfaction evaluations for a wide variety of clients including CVBs, DMOs and tourism offices, tour operators, hospitality groups, developers, etc. In the year 2008 alone, CMI collected and analyzed over 50,000 gay and lesbian survey responses.

Based on tourism industry data from the US Department of Commerce and CMI sample demographics, the annual economic impact of LGBT travelers is approximately \$70.3 billion in the US alone (= a conservative 5% of the U.S. tourism industry).

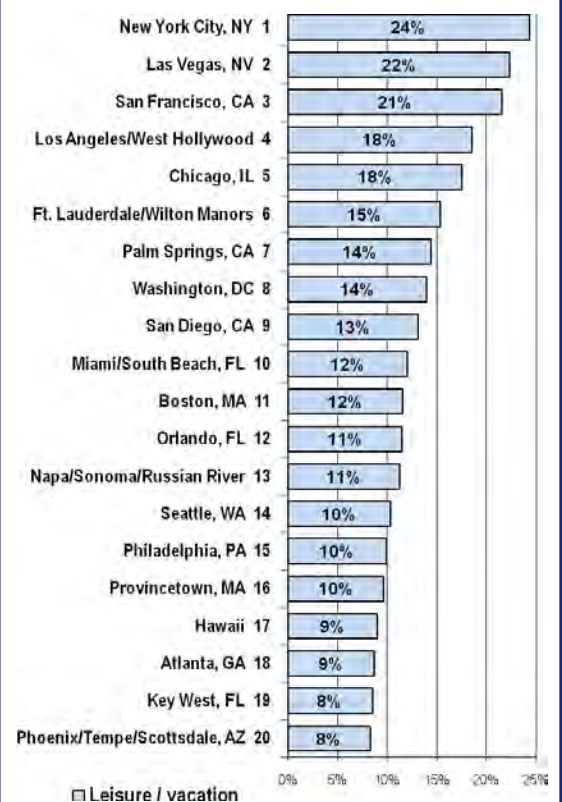
Below are samples of the findings from the US Profile of the report. For more detail and additional content, please refer to the full report. Cross-tabs based on age, gender, relationship status, income, geography, etc. are available from Community Marketing.

LGBT Tourism Trends...

- The top 4 US destinations for LGBT leisure travel have retained their rankings three years in a row. Chicago moved from seventh to fifth place, and other "24 hour cities" trended stronger in the rankings.
- Even with the high cost of international travel, key LGBT destinations remain solid. Slight decreases were noted for a few destinations, yet other destinations rose.
- Respondents took a median of four leisure and business trips during the last twelve months. This is comprised of one leisure trip of 4+ nights, two leisure trips of 1-3 nights, and one business trip. They took a median of four round trip flights to accomplish these trips.
- During the last year, in total, the median respondent spent 10 nights in a hotel while on those leisure trips, and three nights in a hotel while away on business.
- The top preferred hotel type is "moderate/ midscale," with 47% choosing this hotel type often.
- 11% took a group tour. Most common type was an LGBT-specific luxury tour.
- 23% traveled more than 50 miles from home for a Pride celebration, spending a median of two nights in a hotel. New York, San Francisco and Chicago were the most visited Pride events.
- LGBT consumers also travel to a wide variety of special events. 5% attended a LGBT professional association meeting, 4% lesbian event, 4% leather event, 4% bear event, 2% LGBT sports event, 2% LGBT family event.
- Comparing travel for this year to the previous year, respondents indicated that their overall travel was steady: 30% increased their travel, while 31% noted a decrease. A net positive (% who increased minus % who decreased) was noted only for the number of hotel nights (+4%), whereas small net negatives were noted for leisure travel (-3%), number of air flights (-6%) and business travel (-8%). A net negative was also noted for cruises. In spite of this, cruises continue to be a strong market segment for LGBT travelers: 18.7% indicated that they'd taken a cruise in the past year. (See graph on page 2.)

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Most-Visited US Destinations: Leisure Travel Among LGBT Americans (n=4,017)
(Rankings for U.S. business travel, Canada, Europe and other destinations are contained in the full report.)



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Community Marketing, Inc.

13th Annual LGBT Tourism Study

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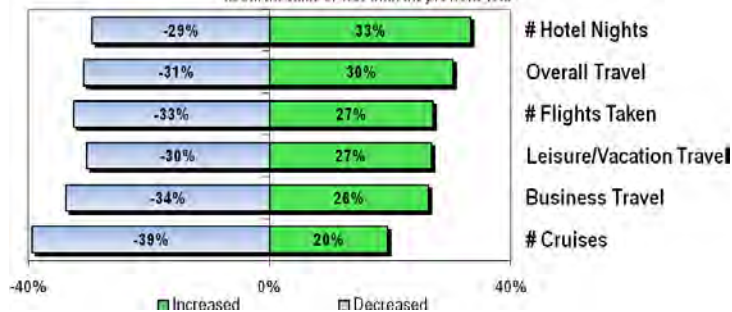
- Half of LGBT leisure travel is now booked directly with the travel supplier. 37% is booked through a travel website, such as Travelocity or Orbitz, 8% from travel agents, and 5% from tour operators. 21% of business trips were book with a travel agent, with other methods proportionally reduced.
- Respondents were motivated most by word of mouth from friends, when selecting a destination for leisure travel. 78% found this criterion very motivating. Next in importance was an article in a LGBT publication, at 46%.
- Respondents preferred their community being referred to as “gay and lesbian” (87% positive), followed closely by gay-friendly (82%) and LGBT or GLBT (80%). See graph, below.
- Price is the top motivator for selecting a hotel (75% said very motivating), followed by an online review of the property (55%), location near attractions (52%), and the brand’s reputation as gay-friendly (50%).
- While on vacation, respondents enjoy going to a popular restaurant (73%), going to the LGBT neighborhood (73%), visiting popular mainstream tourist attractions (70%), and going to a gay or lesbian bar or nightclub (69%). Museums (65%) and shopping (63%) are also very important.

CMI's LGBT Tourism Study: US Profile Demographics (n=4,017)

- 92% of survey respondents identify as gay or lesbian, 4% bisexual, and 3% queer.
- 71% of respondents are men, and 29% are women. 1% identify as transgender. (This survey pool is not intended to reflect the national distribution of the LGBT community.)
- 65% are in a relationship and 35% are single. Of those in relationships, 22% have obtained some form of official government sanction (marriage, civil union, domestic partnership).
- 13% of respondents are non-white.
- 71% have at least a Bachelor's Degree.
- Median household income: \$86,400
- Median age: 47
- 8% have children under 18 at home.
- Wide distribution of respondents, representing 49 U.S. states and the District of Columbia. Top five states include California at 17% of responses, Florida and New York at 8% each, Texas 6%, Illinois 5%.

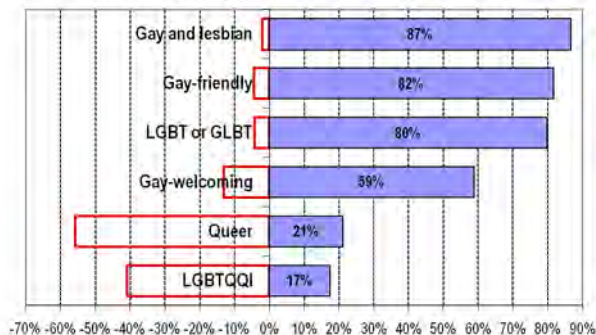
Change in Travel over the Past 12 Months

Comparing your travel over the past 12 months, have you traveled more, about the same or less than the previous year?



Preference for Terms Used in Tourism Ads

When travel companies advertise, they often use the following terms when referring to the community. How do you feel about these terms when used in advertising?



Additional data, plus analysis, trends and interpretation may be found in the full report. Special cross-tab reports are available to assist marketers interested in more detail on sub-segments of LGBT markets. CMI also provides custom survey services, including online and on-site surveys, focus groups, advisory boards, customer satisfaction studies, etc.

For further information or to order the full report, cross-tabs or custom research, please visit our website: www.CommunityMarketingInc.com or contact our office.



ABOUT COMMUNITY MARKETING, INC.

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

Community Marketing, Inc. has been helping tourism industry leaders master the subtleties of this market since 1992. Whether your organization is just learning about the market or is updating its strategy, Community Marketing can accelerate your plans, reduce your risks and deliver measurable results. Because gays and lesbians comprise a “slice” of the world’s population, you’ll find markets for singles, couples and families in every ethnicity. And you’ll find a world of diverse interests, from rodeo to golf to snowboarding, from outdoor adventure to mega-parties to theatre. Community Marketing’s proven, powerful portfolio of services helps deliver your targeted markets.

Community Marketing, Inc. has earned its position as the global leader in gay tourism marketing. Through the company’s tireless efforts since 1992, “doors have opened” around the world for gay and lesbian travelers. We have helped grow gay market recognition through research, media relations and education; and have brought marketing opportunities to the world’s leading gay-welcoming destinations, suppliers and travel agents. Besides its rapidly growing LGBT Market Research + Development Lab[®] practice, we produce the “International Conference on Gay & Lesbian Tourism,” now in its 10th year, and regional “Best Practices in Gay & Lesbian Tourism” seminars. We also developed and operate the TAG Approved[®] Accommodations program and the GLCVB (Gay & Lesbian Convention & Visitors Bureau), and publish the *Annual Gay & Lesbian Travel Industry Directory*. As we look forward, we see our partnership with suppliers, hospitality leaders, government Tourism Offices, Convention & Visitors Bureaus and Destination Marketing Organizations continuing to grow, ultimately helping to create a more welcoming “gay-friendly” environment for gay and lesbian travelers worldwide.

CMI’s LGBT Market Research + Development Lab[®] clients include:

- LA, Inc. (Los Angeles CVB)
- Greater Philadelphia Tourism Marketing Corporation
- Las Vegas Convention & Visitors Authority
- Dallas Convention & Visitors Bureau
- Fort Lauderdale Convention & Visitors Bureau
- San Francisco Convention & Visitors Bureau
- Tempe Convention & Visitors Bureau
- Baltimore Convention & Visitors Bureau
- Palm Springs Bureau of Tourism
- Switzerland Tourism
- Canadian Tourism Commission
- RSVP Vacations
- Travelocity.com LP
- Kimpton Hotels & Restaurants
- Starwood Hotels & Resorts

Besides those listed above, Community Marketing’s other tourism & hospitality clients include:

- New York City, Boston, Miami, Seattle, San Diego, Key West, Vancouver, Halifax, Toronto, etc.
- American Airlines, Alaska Airlines, Southwest, Delta Air Lines, Continental, Qantas, LAN, etc.
- Wyndham Hotels & Resorts, Hilton Hotels, Hyatt Hotels, Marriott Hotels, Accor Hotels, etc.
- Travel Impressions, Out Adventures, Happy Vacations, etc.

CMI's 13th Annual Gay & Lesbian Tourism Study 2009 Market Research, Insights and Intelligence

Community Marketing, Inc. (CMI) is proud to present the 13th edition of our industry-standard Gay & Lesbian Tourism Study. This year, our study's industry, media and educational partners include **IGLTA, ASTA, ATME, USTOA, CLIA, NTA, DMAI, Travel Weekly** and the **University of Nevada**. The largest, most representative, and most respected in the industry, CMI's research studies are frequently quoted in the *New York Times, Wall Street Journal, USA Today, Chicago Tribune, Los Angeles Times, Miami Herald, BrandWeek*, and other leading media.

Since 1994, CMI's Gay & Lesbian Tourism Study data and insights have provided a **powerful foundation** for many gay travel, tourism and hospitality initiatives around the world. CMI's research can bring your organization a **statistical basis** for **development, growth and leadership** in the gay tourism industry.

UNDERSTAND YOUR MARKET: FOCUS ON YOUR UNIQUE OPPORTUNITIES

The gay market is still emerging, yet competitive elements are already developing within certain sectors.

- Where should you focus your resources?
- Where does your growth potential lie, and how can you emerge as a leader?
- How can you best compete (or cooperate)?

Today, gay and lesbian marketing is about segmentation and stratification. Gays and lesbians want to be reached on a personal level, according to individual interests and preferences. On a foundation of market intelligence, you can identify the best market segment matches for your products and services, dramatically improving the results of your marketing and advertising investment.

The report contains 50 pages of data, analysis, color charts and an executive summary of key findings, detailing these important topics, and more:

Traveler Demographics	Travel Frequency	Group Travel	Top Destinations: US and Worldwide
Leisure Activities	Ad Recall	Business travel	Pride and Special Event Travel

Combined with trend insights and comparisons to mainstream consumers, this is the most comprehensive presentation of gay and lesbian traveler preferences ever published. Community Marketing's 13th Annual Gay & Lesbian Tourism Study provides the insights and market intelligence you need to make informed marketing and product development investments. *Includes a free copy of our 12th Annual Gay & Lesbian Tourism Study!*

Thank you for your order:

Your Name _____

Company or Organization _____

Address _____ City _____ St _____ Zip _____

Tel _____ Fax _____ email _____

Gay & Lesbian Tourism Study 2009: \$895 **\$595 for IGLTA Members** \$_____ (delivered as a pdf file).

Includes a copy of our 12th Annual study!

Reports on a variety of market segments, as well as custom surveys and focus groups are also available. Contact us for a quote.

Please mail with US Funds check payable to "Community Marketing, Inc." (address below)

Charge: Visa/MC/Amex # _____ Exp date _____ Signature _____