

CMI's 12th Annual Gay & Lesbian Tourism Study

In partnership with



Key findings from Community Marketing's 12th Annual Gay & Lesbian Tourism Study have been compiled from responses from self-identified gay and lesbian consumers who read LGBT publications, visit LGBT websites, and attend LGBT events. With over 7,500 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 2007 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 \$64.5 billion in the US alone.

Throughout the report, distinctions of various LGBT markets are made based on gender, age, ethnicity, income, geographical location, etc. Below are samples of the findings from the US Profile of the report.

Gay & Lesbian Travel Trends

- The majority (76%) of U.S. lesbian and gay respondents have a valid passport, compared to 24% to 30% of all adult US citizens.
- Gay and lesbian travelers took a median of five overnight trips in the preceding twelve months, including two leisure trips, two personal trips and one business trip. 24% took five or more leisure trips; 24% took five or more personal trips; 19% took five or more business trips.
- Respondents spent a median of 29 nights away from home (average 6 nights per trip).
- Respondents flew a median of six times in the last twelve months (3 round trips), and 81% purchased an airline ticket online.
- Respondents spent a median of 14 nights in hotels. 77% purchased accommodations online at least once.
- The leading motivations for choosing a hotel are: (1) Reputation for gay-friendliness and (2) location near attractions.
- The top three criteria gays and lesbians site when choosing vacation destinations are: (1) Recommendation by friends, (2) unique attraction offerings, and (3) a reputation for gay friendliness.
- 34% of respondents took a cruise vacation in the last year and 62% expressed interest in a cruise. (In comparison, 34% of Cruise Lines International Association's (CLIA) mainstream target market has ever taken a cruise.)
- Respondents indicate that the availability of online information is highly important in getting the necessary information to this audience to plan a trip.
- 25% of U.S. respondents traveled and spent at least one night away from home to attend a gay pride event.

Gay & Lesbian Tourism Study Demographics...

- 65% of survey respondents were gay men, 28% lesbian, 7% bisexual, transgender, queer or other. (This does not necessarily reflect the national distribution of the LGBT community.)
- 74% of gay men and 67% of lesbians are college graduates. 34% of both groups have a graduate degree or higher.
- 35% are single. Of those in relationships, the median length of the relationship is seven years.
- The median age is 46.

Additional data, plus analysis, trends and interpretation may be found in the full report. Special cross-tab reports and custom survey studies are available to assist marketers interested in more detail on sub-segments of LGBT markets. For further information or to order the full report, cross-tabs or custom research, please visit www.CommunityMarketingInc.com or contact our office.

Permission to use this data is granted on the condition that all LGBT research references credit "Community Marketing, Inc., San Francisco, CA"

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Most-Visited US Destinations

Not all segments of LGBT markets behave the same way. For example, demographic groups frequent different destinations as shown below. (A similar graph is available for int'l destinations.)

Rankings	Gay Men				Lesbians			
	GenY	GenX	Boomers	Seniors	GenY	GenX	Boomers	Seniors
1. New York	1	1	1	1	3	3	2	6
2. Las Vegas	2	2	2	3	2	1	1	10
3. San Francisco	4	4	3	5	1	4	3	3
4. Los Angeles	3	3	6	6	4	7	11	17
5. Fort Lauderdale	9	6	5	2	N/R	12	19	7
6. Palm Springs	12	9	4	3	15	9	13	7
7. Chicago	7	5	7	10	11	8	17	14
8. San Diego	8	10	8	8	7	10	9	2
9. Washington DC	6	8	10	7	7	14	11	11
* Miami	5	7	10	8	12	19	16	14
* Provincetown	18	11	15	13	4	6	4	1

CMI's 12th Annual Gay & Lesbian Tourism Study

Market Research, Insights and Intelligence

Special DMAI Member \$200 Discount

Community Marketing is proud to present the 12th edition of our industry-standard Gay & Lesbian Tourism Study. This year's study is **co-sponsored by USTOA, IGLTA, ASTA, ATME, TTI and DMAI**. The most comprehensive and respected in the industry, this study is frequently quoted in the *New York Times*, *Wall Street Journal*, *Los Angeles Times*, *Chicago Tribune*, *USA Today* 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 and lesbian 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 identify cooperative opportunities)?

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 70+ pages of data, analysis, color charts and an executive summary of key findings, detailing these important topics, and more:

Traveler demographics	Travel frequency	Travel spending	Top destinations
Purchase behavior	Psychographics	Motivations	Marketing channels

Combined with trend analysis from the past twelve years, and numerous comparisons to mainstream consumers, this is the most comprehensive presentation of gay and lesbian traveler preferences ever published. Community Marketing's 12th Annual Gay & Lesbian Tourism Study provides the insights and market intelligence you need to make informed marketing and product development investments.

Thank you for your order:

Your Name _____

Company or Organization _____

Address _____ City _____ St _____ Zip _____

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Gay & Lesbian Tourism Study 2008: ~~\$695~~ ea **\$495 for DMAI Members** US\$ _____ (delivered as a pdf file)

Note: Custom Cross-Tab reports on a variety of market sub-segments (e.g. high income, adventure travelers, etc.), as well as custom studies specific to your needs, are also available to DMAI Members at a 10% Discount. Contact us for details.

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

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

12th Annual LGBT Tourism Study • US Profile • September 2007

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This report contains a detailed statistical analysis of the results for the 12th Annual LGBT Tourism Survey. 6,764 completed LGBT responses who reside in the United States took the survey in the 27-day period from Wednesday, September 5, 2007 to Monday, October 1, 2007.

KEY FINDINGS

How Much We Travel

- Number of Overnight Trips
- Length of Trips
- Travel Spending
 - Changes in Spending Habits*
- Purchase of Travel Components
 - Purchase Location*
 - Hotel Stays*
 - Motivations for choosing a Hotel*
 - Commercial Air Flights*
 - Car Rentals*
 - Cruise Travel*

Where We Travel: Destinations

- Motivations for Choosing a Travel Destination
 - Passport*
- Top Travel Destinations
- Top 20 US Destinations
- Canada
- Mexico and Central America
- The Caribbean
- South America
- Europe
- Asia and Africa
- Oceania
 - Trends for Leisure Travel*

Why We Travel: Motivations

- Vacation Styles
- Preferred Environments
- LGBT Events
 - Attendance at LGBT Meetings*
- Vacation Months
- Impact of Global Warming
 - Uses for Online Technology*
- LGBT Group Affiliations

Demographics

- Age
- Geographical Distribution
- Gender
- Sexual Orientation
- Education
 - Employment Status*
- Relationship Status
 - Length of Relationships*
- Household Income
- Ethnicity Children in Household
- Publications
- Travel Industry Affiliation and Meeting Planners

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 Gay Market Research + Development Lab® practice, we produce the “International Conference on Gay & Lesbian Tourism,” now in its 9th year, and regional “Best Practices in Gay & Lesbian Tourism” seminars. We also developed and operate the TAG Approved® Accommodations program, 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.