

15th Annual Gay & Lesbian Tourism Report

*Exploring tourism and hospitality opportunities
in the gay and lesbian marketplace.*

2010-2011



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**Community Marketing, Inc.'s (CMI)
15th Annual Gay & Lesbian Tourism Study**

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INTRODUCTION

Findings from Community Marketing, Inc.'s (CMI) *15th Annual Gay & Lesbian Tourism Study* have been compiled among responses from self-identified gay and lesbian consumers who read LGBT publications, visit LGBT websites, interact with LGBT organizations and/or attend LGBT events. With over 6,000 responses, CMI samples far more qualified respondents than any other LGBT tourism research, and offers valuable insights about consumers who may be reached through LGBT-dedicated marketing initiatives.

In addition to the *Tourism Study*, CMI produces the annual LGBT Community Survey® and publishes the resulting LGBT Consumer Index®, and conducts custom online surveys, telephone interviews, focus groups, advisory boards, field studies and customer satisfaction evaluations for a wide variety of clients including CVBs, DMOs and tourism offices, tour operators, hospitality groups, developers, etc., as well as leaders in other industries.

Based on tourism industry data from the US Department of Commerce and CMI sample demographics, the annual economic impact of LGBT travelers is approximately \$65 billion in the US alone (adjusted down \$4 billion from last year because of the recession).

This report contains an analysis of the results for the *15th Annual Gay & Lesbian Tourism Survey*. Of the 6,884 total survey participants in this year's study, approximately 4,800 are LGBT consumers who reside in the United States, and this report reflects the U. S. cohort.

For more information about this report, or to inquire about cross tabs or custom tourism, hospitality or other research studies, contact David Paisley at david@communitymarketinginc.com.

METHODOLOGY

During the 30-day period from October 1, 2010 to October 30, 2010, Community Marketing, Inc. (CMI) conducted an online survey of self-identified gay and lesbian individuals selected from CMI's proprietary survey panel regarding their travel habits and motivators, in order to provide data and insight to the tourism, travel and hospitality industries.

Community Marketing has developed its travel survey panel over the last 15+ years by partnering with leading media companies from across the United States and beyond, as well as with LGBT organizations and events. Subscribers to our survey panel received an email invitation to take a gay/lesbian travel survey, with an incentive to win cash prizes in a random drawing. In order to keep the survey panel geographically balanced to reflect the US Census same-sex partner data (which is important for the destination rankings), multiple invitations are distributed to panel members living in underrepresented regions until the profile was geographically balanced.

We make no attempt in this study to define the size of the LGBT population (which is virtually impossible for many reasons), nor are these findings intended to represent or profile the entire US gay and lesbian population (similarly challenging). Instead, these findings are designed to provide guidance to tourism companies and destinations looking to outreach to the LGBT community through their media, events and organizations, as survey participants reflect gay men and lesbians that interact with LGBT media, events and organizations. Some survey questions invite multiple responses, and in these cases, percentages total more than 100.

SURVEY DEMOGRAPHICS

The purpose of the survey is to give guidance to travel-related companies considering advertising in the gay and lesbian media (print and Internet), and/or considering sponsorship of LGBT community organizations. The demographics of this survey are consistent with the reader profiles of the majority of LGBT media, trending significantly towards white and male (except for specific lesbian media), and middle-aged.

This demographic profile represents 4,854 study participants who live in the United States.

The median age was 47.

74% were gay or bisexual men, 25% lesbian or bisexual women, and 1% transgender.

Of men, 5% consider themselves to be bisexual. Of women 10% consider themselves to be bisexual.

38% were single, 51% living with partner, and 11% in relationship not living with partner.

6% of entire panel had children under 18 living at home (16% of women reported children at home).

Panel ethnicity was 85% White, 5% Latino, 4% African American, 2% Asian, 4% other/mixed.

41% live in a big city, 20% medium sized city, 15% suburb, 11% small city, 6% small town, 6% rural, 1% resort community.

Key Findings and Observations

Overview:

Findings from Community Marketing, Inc.'s (CMI) *15th Annual Gay & Lesbian Tourism Study* have been compiled from responses from 4,854 self-identified LGBT travelers living in the United States. The research report contains many questions that have been asked for many years. The key findings and observations section below reflect new or changing information or questions.

For any company just starting to outreach to the LGBT travel market, much of the findings in this report, while not new to the experienced sales and marketing professional, contain valuable information that will direct you in structuring an LGBT outreach program. For the 15th year, Community Marketing, Inc. is proud to provide this free report to the travel community in hopes of building a strong and sustained effort to better serve LGBT travelers.

For more information about this report or to inquire about cross tabs or custom travel reports, contact David Paisley at david@communitymarketinginc.com.

Key Findings and Observations

1) Decrease in LGBT Travel for 2nd Year in a Row – But Leveling Off

For the second year in a row, LGBT travelers reported an overall decrease in travel. However the decrease was not as steep as the decline for the 12-month period preceding October 2009. From November 2009 to October 2010, LGBT leisure travel decreased only 1% to 3%. However business travel and cruise travel continued their significant declines. Regional vacations or “staycations” saw their second year of significant increases.

2) LGBT Travel Looking Much Better for 2010

Participants in the survey expressed strong interest in travel in 2011, and indicated that purchasing a delayed major vacation was more important than purchasing other items like cars, furniture or clothing.

3) USA Destination Rankings Remain Largely Unchanged

CMI’s ranking of top destinations remain consistent from last year (based on the consistent question of where did you travel in the past 12 months, and spend at least one night in a hotel). New York, San Francisco, Las Vegas, Chicago, Washington DC and Los Angeles remain the top six destinations.

4) New Orleans on the Rise

The only exception to the individual destination decreases in LGBT travel was New Orleans, which showed an increase from previous years, and jumped from a destination ranking of number 19 in 2009, to number 13 in 2010. More than likely, this increase is a reflection of the return of New Orleans as a top LGBT destination post-Katrina.

5) Washington DC LGBT Business Travel on Rise

For the first time Washington DC has moved into the number one destination ranking for LGBT business travel. With its concentration of tech companies, cultural facilities, tourism companies, LGBT advocacy organizations, and home to many LGBT conferences and business events, business travel to the nation’s capital is strong.

6) Top LGBT Travel Brands - Kimpton on Rise as Hotel Brand in LGBT Community

As a write-in, unprompted question, participants were asked which destination, hotel brand and airline have done the best job promoting themselves to the LGBT community. American Airlines, and Las Vegas remain the top airline and destination brands, while Kimpton moved to the top position for hotels.

7) Safety an Important Motivator

For the first time the survey asked if safety was a motivator in choosing one destination over another. 65% of gay men and 72% of lesbians indicated it was an important factor in choosing their vacation travel destination.

8) Trend Away from “All-Gay” Travel

In keeping with ongoing trends, gay men and lesbians prefer to travel in a “gay-friendly mix,” which includes the LGBT community and progressive straights. Over time this survey has found that fewer and fewer gay men and lesbians are looking for an “all-gay” environment. However, about a third of LGBT respondents do still prefer to travel in an “all-LGBT” environment, and that group trends older in age.

9) Online Purchases Most Important

While it is no surprise that over 80% of gay men and lesbians purchased their last vacation online, it may surprise some travel companies that the majority of participants visited and compared at least three websites before making the purchase. Only 25% visited one website and purchased their travel products there.

10) Pride Continues to Drive Significant LGBT Travel

Over 20% of LGBT travelers indicated that they traveled to another city and spent a night or more to attend Pride events in the past 12 months. LGBTs age 21-35 also find Pride a valuable experience, and are slightly more likely to travel for these events than older LGBTs.

11) LGBT Professional Events Growing

With more and more LGBT professional and association conferences and meetings in development every year, nearly 6% of LGBT survey participants indicated they traveled to another city to attend such a meeting. That is more than are traveling to LGBT sporting events or circuit/dance events.

12) Price and Food Trump LGBT-specific Incentives for Hotel Purchases

Participants were asked, “When hotels create LGBT packages and promotions, what motivates you to purchase...” By far price, food, and alcohol-related incentives were more motivating than incentives such as passes to gay events, donations to LGBT non-profits, and LGBT magazine subscriptions.

13) LGBT Travel with Pets

Approximately 12% of LGBT survey participants traveled with pets during the last year, involving at least one overnight hotel stay. Lesbians are far more likely to travel with pets than gay men (18% compared to 10%). Almost all pet-inclusive travel involves a dog (87%).

Top Destinations for LGBT Travelers Living in the United States

Findings:

CMI's destination rankings are reflective of the 4,296 lesbian, gay, bisexual and transgender respondents who are residents of the United States; who traveled to the destination in the past 12 months, and who spent at least one night in a hotel.

CMI's ranking of top LGBT destinations remains remarkably steady from year to year (based on the consistent question of, "where did you travel in the past 12 months, and spend at least one night in a hotel?"). With the exception of New Orleans, no top destination significantly improved, nor surrendered it's ranking from 2009 (i.e. jumping or decreasing more than two places).

Of top destinations, and for the second year in a row, nearly all destinations reported a small decrease in LGBT visitors, usually in the 1% to 3% range.

The only exception to the individual destination decreases in LGBT travel was New Orleans, which showed an increase from previous years, jumping from a destination ranking of number 19 in 2009, to number 13 in 2010. More than likely, this increase is a reflection of the return of New Orleans as a top LGBT destination post-Katrina.

For the first time Washington, D.C. has moved into the number one destination ranking for LGBT business travel. With its concentration of tech companies, historic and cultural attractions, tourism companies and LGBT advocacy organizations, and being a destination for many LGBT conferences and business events, business travel to the nation's capital is strong.

Top 25 US Destinations for American LGBT Travelers (Leisure + Business)

Percentage who visited and spent a night in a hotel (as combined leisure and business travel ranking). Percentage rounded to nearest percentage, ties in rankings are indicated.

**Total Leisure
+ Business**

1) New York City	27%
2) San Francisco	23%
3) Las Vegas	22%
3) Chicago	22%
3) Los Angeles	22%
6) Washington, DC	21%
7) Fort Lauderdale	14%
7) San Diego, CA	14%
9) Boston, MA	12%
9) Orlando, FL	12%
9) Philadelphia	12%
9) Seattle	12%
13) Miami	11%
13) New Orleans	11%
13) Palm Springs	11%
13) Atlanta	11%
17) Dallas	10%
17) Denver	10%
17) Phoenix	10%
20) Baltimore	8%
20) Napa County, CA	8%
20) Sonoma County, CA	8%
20) Portland	8%
20) Tampa	8%
25) Austin	7%
25) Hawaii	7%
25) Key West	7%
25) Provincetown	7%

The following lists are reflective of the 4,296 lesbian, gay, bisexual and transgender respondents who are residents of the United States, who traveled to the city in the past 12 months, and spent at least one night in a hotel.

Top 20 Leisure Destinations (Not Including Business Travel)

1) New York City	19%
2) San Francisco	17%
2) Las Vegas	17%
4) Chicago	14%
4) Los Angeles	14%
6) Washington, DC	13%
7) Ft. Lauderdale	11%
8) Palm Springs, CA	10%
9) Orlando, FL	9%
9) San Diego, CA	9%
11) Boston, MA	8%
11) Miami	8%
11) Philadelphia	8%
11) Seattle	8%
11) New Orleans	8%
16) Provincetown	7%
16) Sonoma, CA	7%
16) Napa, CA	7%
19) Hawaii	6%
19) Denver	6%
19) Phoenix	6%
19) Key West	6%

Rankings by Age and Gender**Leisure Rankings: Gay Men 18-35**

- 1) New York
- 2) Las Vegas
- 3) San Francisco
- 4) Chicago
- 5) Washington DC
- 6) Los Angeles
- 7) Miami
- 8) Orlando
- 9) Boston
- 10) San Diego / Philadelphia (tie)

Leisure Rankings: Gay Men 36-54

- 1) New York
- 2) San Francisco
- 3) Las Vegas
- 4) Los Angeles
- 5) Chicago
- 6) Fort Lauderdale
- 7) Washington DC
- 8) Palm Springs
- 9) Orlando
- 10) Philadelphia / Miami (tie)

Leisure Rankings: Gay Men 55+

- 1) San Francisco
- 2) New York City
- 3) Las Vegas
- 4) Palm Springs
- 5) Fort Lauderdale
- 6) Washington DC
- 7) Los Angeles
- 8) Chicago
- 9) San Diego
- 10) Orlando / England (tie) *

* England scored as the #10 destination for older gay men. This is the first time an international destination has broken into the top ten for any sub group of US gay and lesbian travelers.

Leisure Rankings: Lesbians 18-35

- 1) Las Vegas
- 2) San Francisco
- 3) Los Angeles
- 4) Chicago
- 5) New York City
- 6) Boston
- 7) Orlando
- 8) Washington DC
- 9) San Diego
- 10) Philadelphia

Leisure Rankings: Lesbians 36-54

- 1) Las Vegas
- 2) San Francisco
- 3) Chicago
- 4) New York City
- 5) Seattle
- 6) Orlando
- 7) Los Angeles
- 8) San Diego
- 9) Washington DC
- 10) Sonoma County, CA

Leisure Rankings: Lesbians 55+

- 1) San Francisco
- 2) Las Vegas
- 3) Provincetown
- 4) Los Angeles
- 5) Seattle
- 6) Chicago
- 7) New York City
- 8) Tampa
- 9) Washington DC
- 10) Boston

**Top 10 Ranking Chart
USA Gay & Lesbian Travelers by Age**

The following lists are reflective of the 4,296 lesbian, gay, bisexual and transgender respondents who are residents of the United States, who traveled to the city in the past 12 months, and spent at least one night in a hotel.

Rankings by Age	GAY MEN			LESBIANS		
	Age 18-35	Age 36-54	Age 55+	Age 18-35	Age 36-54	Age 55+
New York City	1	1	2	5	4	7
San Francisco	3	2	1	2	2	1
Las Vegas	2	3	3	1	1	2
Chicago	4	5	8	4	3	6
Los Angeles	6	4	7	3	7	4
Washington DC	5	7	6	8	9	9
Fort Lauderdale		6	5			
Palm Springs		8	4			
Orlando	8	9	10	7	6	
San Diego	10		9	9	8	
Boston	9			6		10
Miami	7	10				
Philadelphia	10	10		10		
Seattle					5	5
Sonoma, CA					10	
Tampa						8
Provincetown						3

Rankings by Business Travel (Not Including Leisure Travel)

The following lists are reflective of the 4,296 lesbian, gay, bisexual and transgender respondents who are residents of the United States, who traveled to the city in the past 12 months, and spent at least one night in a hotel.

- 1) Washington, DC
- 2) New York City
- 2) Chicago
- 4) San Francisco
- 4) Los Angeles
- 6) Las Vegas
- 7) Dallas
- 7) San Diego, CA
- 7) Atlanta
- 10) Philadelphia
- 10) Seattle
- 10) Denver
- 10) Phoenix
- 10) Boston

International Travel by United States LGBT Residents over the Past 12 Months

The following lists are reflective of the 4,296 lesbian, gay, bisexual and transgender respondents who are residents of the United States, who traveled to the city in the past 12 months, and spent at least one night in a hotel.

Canada

The three largest Canadian cities are statistically tied for LGBT travel by US residents.

	Leisure	Business	Total
Montreal	4.3%	1.3%	5.6%
Toronto	4.4%	2.1%	6.5%
Vancouver	4.6%	1.4%	6.0%
Victoria	2%		
Halifax	1%		
Quebec City	1%		
Whistler	1%		

Europe

England	6%	(England also achieved 2% additional business travel)
France	5%	
Germany	4%	
Italy	4%	
Spain	4%	
Netherlands	3%	
Sweden	2%	
Greece	2%	
Ireland	2%	
Denmark	2%	

South/Central America, Caribbean

Puerto Vallarta, Mexico	5%
Cancun, Mexico	4%
Puerto Rico	3%
US Virgin Islands	3%
British Virgin Islands	2%
Costa Rica	2%
Argentina	2%
Brazil	1%
Mexico City, Mexico	1%

Other International

Australia	2%
Thailand	1.5%
Hong Kong	1%
Japan	1%
Egypt	1%
China Mainland	1%
Israel	1%
New Zealand	1%
South Africa	0.5%

Canadian LGBT Travelers (Primarily English-Speaking Canadians)

Note: Survey respondents included 460 Canadians. However since the survey was in English, and CMI research panel is largely English-speaking, the following results better represents English-speaking Canada. Respondents were 21% overrepresented in Ontario, 44% overrepresented in British Columbia and 73% underrepresented for Quebec. For the USA sample, we balance sample representation by major metro area, but this was not feasible in Canada.

Travel to all Destinations by Canadian LGBT Residents

1) Montreal	23%
2) Toronto	21%
3) Vancouver	20%
4) New York City	15%
5) Las Vegas	13%
5) Banff	13%
7) Calgary	12%
7) Ottawa	12%
9) Victoria	11%
10) Seattle	10%
11) San Francisco	9%
11) Quebec City	9%
11) Puerto Vallarta	9%
11) England	9%
15) Halifax	8%
15) Whistler	8%
17) France	7%
17) Fort Lauderdale	7%
17) Palm Springs	7%
20) Boston	6%

Travel to Non-Canadian Destinations by Canadian LGBT Residents

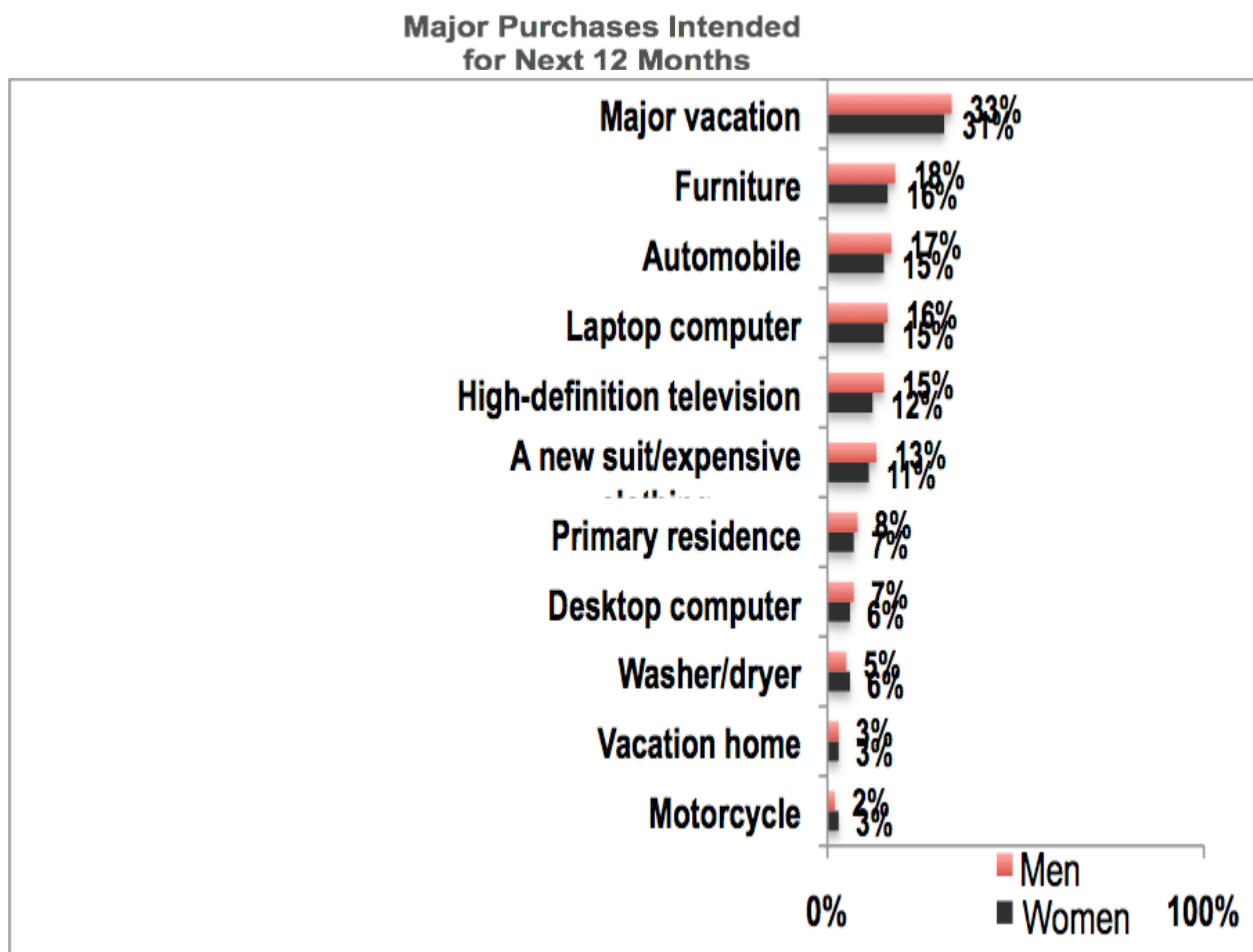
1) New York City	15%
2) Las Vegas	13%
3) Seattle	10%
4) San Francisco	9%
4) Puerto Vallarta	9%
4) England	9%
7) France	7%
7) Fort Lauderdale	7%
7) Palm Springs	7%
10) Boston	6%
11) Chicago	5%
11) Los Angeles	5%
11) Orlando	5%
11) Germany	5%
11) Miami	5%

Post-Recession Purchases

The following question was part of Community Marketing's 4th Annual LGBT Community Survey® (Summer 2010). We felt it was especially important to include with this report, as travel purchases scored far higher than most other types of purchases.

Q. Now that the recession is ending, are there purchases that you have put off due to the economy that you plan to make in the next 12 months?

Gay men (n=22,829); Lesbian/Gay Women (n=4,012).



Top Travel Brands in the LGBT Community

Survey participants were asked as a blind write-in question (i.e. empty text box), which airline, hotel and destination is doing the “best job outreaching to the LGBT community.”

Question #1: Over the past year, **which city, resort town, state or country** has done the best job promoting themselves to the LGBT community? Base your answer on the destination’s LGBT advertising, outreach and communications. Please write only one destination.

The top destinations indicated were:

Las Vegas:	11%
San Francisco:	7%
Palm Springs:	7%
Philadelphia:	7%
Provincetown:	5%

Question#2: Over the past year which **hotel brand** has done the best job promoting themselves to the LGBT community? Base your answer on the hotel’s LGBT advertising, outreach and communications. Please write only one hotel brand name.

The top hotel brands indicated were:

Kimpton Hotels:	13%
W Hotels:	11%
Hilton:	9%
Hyatt:	7%
Marriott:	7%

Question #3: Over the past year which **airline** has done the best job promoting themselves to the LGBT community? Base your answer on the airline’s LGBT advertising, outreach and communications. Please write only one airline

The top airlines indicated were:

American Airlines:	40%
Southwest:	12%
Delta:	8%

Question #4: As a new question in 2010, participants were asked, “Looking at all the countries in the world, when you consider its LGBT rights record and acceptance as a gay or lesbian visitor, what country seems most accepting?”

The top countries reported were:

Netherlands	31%
Canada	20%
England/UK	8%

Perceived LGBT Travel Increase or Decease

For the second year in a row, LGBT travelers reported an overall decrease in travel. However the decrease was not as steep as the decline for the 12-month period preceding October 2009.

From November 2009 to October 2010, leisure travel decreased only 1 to 3%. However business travel and cruise travel continued their significant declines. Regional vacations or “staycations” saw their second year of increases.

Comparing your travel during the past 12 months to your travel in the previous year, have you traveled more, about the same, or less than the previous year? (Change in Travel)

All LGBT PARTICIPANTS

		Travel decreased	About the same	Travel increased	Total
Overall travel	Count	1418	1963	1349	4730
	% by Row	30.0%	41.5%	28.5%	100.0%
Leisure travel	Count	1329	2026	1244	4599
	% by Row	28.9%	44.1%	27.0%	100.0%
Business travel	Count	1220	1284	741	3245
	% by Row	37.6%	39.6%	22.8%	100.0%
Number of flights taken	Count	1352	1752	1150	4254
	% by Row	31.8%	41.2%	27.0%	100.0%
Number of nights in hotels	Count	1266	1761	1466	4493
	% by Row	28.2%	39.2%	32.6%	100.0%
Number of cruises	Count	857	835	321	2013
	% by Row	42.6%	41.5%	15.9%	100.0%
Number of local/regional staycations or drive vacations	Count	765	2081	1350	4196
	% by Row	18.2%	49.6%	32.2%	100.0%

How many total trips did you take in the last 12 months, where you stayed in paid accommodations at least one night? Please mark a number in each category, leisure and business. (Overnight trips in last 12 months)

All LGBT PARTICIPANTS

		0	1	2	3	4	5	6	7	8	9	10+	Total
Leisure trips (vacations)	Count	625	574	820	743	596	423	311	135	110	37	402	4776
	% by Row	13.1%	12.0%	17.2%	15.6%	12.5%	8.9%	6.5%	2.8%	2.3%	0.8%	8.4%	100.0%
Business trips	Count	2277	565	431	246	149	129	96	53	45	12	360	4363
	% by Row	52.2%	12.9%	9.9%	5.6%	3.4%	3.0%	2.2%	1.2%	1.0%	0.3%	8.3%	100.0%

GAY MEN

		0	1	2	3	4	5	6	7	8	9	10+	Total
Leisure trips (vacations)	Count	470	396	598	540	429	318	242	107	86	32	346	3564
	% by Row	13.2%	11.1%	16.8%	15.2%	12.0%	8.9%	6.8%	3.0%	2.4%	0.9%	9.7%	100.0%
Business trips	Count	1662	404	317	186	116	108	78	43	41	8	306	3269
	% by Row	50.8%	12.4%	9.7%	5.7%	3.5%	3.3%	2.4%	1.3%	1.3%	0.2%	9.4%	100.0%

LESBIANS

		0	1	2	3	4	5	6	7	8	9	10+	Total
Leisure trips (vacations)	Count	151	168	220	200	161	104	69	27	24	5	55	1184
	% by Row	12.8%	14.2%	18.6%	16.9%	13.6%	8.8%	5.8%	2.3%	2.0%	0.4%	4.6%	100.0%
Business trips	Count	600	159	110	59	32	21	17	10	4	4	51	1067
	% by Row	56.2%	14.9%	10.3%	5.5%	3.0%	2.0%	1.6%	0.9%	0.4%	0.4%	4.8%	100.0%

How many total round trip airplane flights have you taken in the last 12 months?

ALL LGBT PARTICIPANTS

		0	1	2	3	4	5	6	7	8	9	10+	Total
Number of flights for overnight trips in last 12 months	Count	1136	692	752	563	421	245	233	103	124	48	523	4840
	% by Row	23.5%	14.3%	15.5%	11.6%	8.7%	5.1%	4.8%	2.1%	2.6%	1.0%	10.8%	100.0%

GAY MEN

		0	1	2	3	4	5	6	7	8	9	10+	Total
Number of flights for overnight trips in last 12 months	Count	792	468	547	413	310	198	188	77	108	43	472	3616
	% by Row	21.9%	12.9%	15.1%	11.4%	8.6%	5.5%	5.2%	2.1%	3.0%	1.2%	13.1%	100.0%

LESBIANS

		0	1	2	3	4	5	6	7	8	9	10+	Total
Number of flights for overnight trips in last 12 months	Count	336	218	199	149	107	47	45	26	16	5	48	1196
	% by Row	28.1%	18.2%	16.6%	12.5%	8.9%	3.9%	3.8%	2.2%	1.3%	0.4%	4.0%	100.0%

How many total nights have you spent in paid accommodations in another locale over the past 12 months?

All LGBT PARTICIPANTS

		0	1-5	6-10	11-15	16-20	21-25	26+	Total
Number of hotel nights for overnight trips in last 12 months	Count	624	1217	941	650	506	291	625	4854
	% by Row	12.9%	25.1%	19.4%	13.4%	10.4%	6.0%	12.9%	100.0%

GAY MEN

		0	1-5	6-10	11-15	16-20	21-25	26+	Total
Number of hotel nights for overnight trips in last 12 months	Count	470	832	669	486	386	247	536	3626
	% by Row	13.0%	22.9%	18.5%	13.4%	10.6%	6.8%	14.8%	100.0%

LESBIANS

		0	1-5	6-10	11-15	16-20	21-25	26+	Total
Number of hotel nights for overnight trips in last 12 months	Count	148	373	269	160	119	44	86	1199
	% by Row	12.3%	31.1%	22.4%	13.3%	9.9%	3.7%	7.2%	100.0%

Cruise Travel

All LGBT PARTICIPANTS

		0	1	2	3+	Total
How many cruises in total did you take in the past 12 months?	Count	4034	556	127	51	4768
	% by Row	84.6%	11.7%	2.7%	1.1%	100.0%
How many of those cruises were LGBT Charter Cruises (like Atlantis or Olivia)?	Count	4405	182	31	11	4629
	% by Row	95.2%	3.9%	0.7%	0.2%	100.0%
How many of those cruises were small LGBT group on a mainstream cruise?	Count	4486	107	20	4	4617
	% by Row	97.2%	2.3%	0.4%	0.1%	100.0%

Group Travel

All LGBT PARTICIPANTS

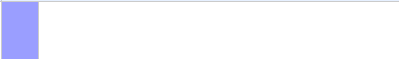
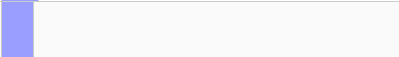



		0	1	2	3+	Total
How many group tours in total did you take in the past 12 months (group of people in taking part in a packaged itinerary)?	Count	4006	417	115	65	4603
	% by Row	87.0%	9.1%	2.5%	1.4%	100.0%
How many of those tours were LGBT oriented (primarily LGBT people traveling together)?	Count	4124	209	50	31	4414
	% by Row	93.4%	4.7%	1.1%	0.7%	100.0%

Importance of Perceived Safety in Travel Decisions

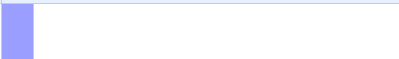
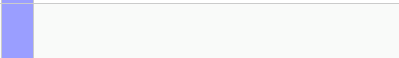

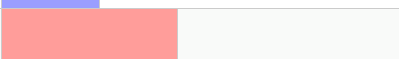

Both gay men and especially lesbians find that perceived safety is a major factor in their decision to travel to one destination over another.

When looking at the many factors for choosing a one destination over another, how important is the perceived safety of the destination in your selection process? (Respondents could only choose a single response)

GAY MEN

Response	Chart	Frequency	Count
1 Minor Factor		5.5%	195
2		4.2%	150
3 Neutral		25.3%	900
4		39.3%	1400
5 Major Factor		25.7%	915
Not Answered			27
		Valid Responses	3560






LESBIANS

Response	Chart	Frequency	Count
1 Minor Factor		3.7%	43
2		3.7%	43
3 Neutral		20.5%	242
4		40.8%	481
5 Major Factor		31.3%	369
Not Answered			11
		Valid Responses	1178






Preference for Gay / Straight Mix When Traveling

In keeping with ongoing trends, gay men and lesbians prefer to travel in a “gay-friendly mix,” which includes the LGBT community and progressive straights. Over time this survey has found that fewer and fewer gay men and lesbians are looking for an “all-gay” environment. However, about a third of the LGBT community does still prefer to travel in an “all-LGBT” environment, and that group trends older in age.

GAY MEN: When you travel with a group or attend an event, what mix of people do you prefer?

Response	Chart	Frequency	Count
I prefer a gay-friendly mix, some LGBT people, with progressive straights		51.3%	1759
I prefer gay male only		19.0%	650
I prefer mainstream travel without an LGBT emphasis		12.8%	440
I prefer a mix of the entire LGBT community		12.4%	426
I prefer men only (gay and straight men)		4.5%	154
Not Answered			21
		Valid Responses	3429

LESBIANS: When you travel with a group or attend an event, what mix of people do you prefer? (Respondents could only choose a single response)

Response	Chart	Frequency	Count
I prefer a gay-friendly mix, some LGBT people, with progressive straights		50.4%	545
I prefer a mix of the entire LGBT community		21.2%	229
I prefer lesbian only		13.3%	144
I prefer women only (lesbian or straight women)		8.6%	93
I prefer mainstream travel without an LGBT emphasis		6.6%	71
Not Answered			2
		Valid Responses	1082

Destination Motivations

In this section, we want to understand which resources motivate you to visit. Please answer this section regarding your most recent vacation/holiday (not business travel) to your last destination. What influenced you to chose the destination over others?

All LGBT PARTICIPANTS

		Major influence	Some influence	No influence	Total
Romance with partner	Count	1072	1076	2243	4391
	% by Row	24.4%	24.5%	51.1%	100.0%
Sexual adventure	Count	478	947	2962	4387
	% by Row	10.9%	21.6%	67.5%	100.0%
Food and wine	Count	901	1527	1959	4387
	% by Row	20.5%	34.8%	44.7%	100.0%
Visit family or friends	Count	1600	732	2080	4412
	% by Row	36.3%	16.6%	47.1%	100.0%
Gay/lesbian bars, clubs, parties, etc.	Count	798	1199	2400	4397
	% by Row	18.1%	27.3%	54.6%	100.0%
Explore new destinations	Count	1591	1094	1705	4390
	% by Row	36.2%	24.9%	38.8%	100.0%
Return to favorite destinations	Count	1643	1000	1761	4404
	% by Row	37.3%	22.7%	40.0%	100.0%
Rest and relaxation	Count	2250	1360	798	4408
	% by Row	51.0%	30.9%	18.1%	100.0%
Mainstream event (festival, concert, etc.)	Count	580	746	3064	4390
	% by Row	13.2%	17.0%	69.8%	100.0%
LGBT event (Pride, film festival, etc.)	Count	532	524	3340	4396
	% by Row	12.1%	11.9%	76.0%	100.0%

Spa	Count	206	589	3579	4374
	% by Row	4.7%	13.5%	81.8%	100.0%
Gay accommodations or cruise	Count	591	639	3154	4384
	% by Row	13.5%	14.6%	71.9%	100.0%
Adventure travel (hiking, kayaking, cycling, etc.)	Count	570	941	2891	4402
	% by Row	12.9%	21.4%	65.7%	100.0%
Culture (art, architecture, music, theatre, etc.)	Count	1246	1397	1772	4415
	% by Row	28.2%	31.6%	40.1%	100.0%
Shopping	Count	477	1366	2542	4385
	% by Row	10.9%	31.2%	58.0%	100.0%
Combined with a business trip	Count	278	374	3725	4377
	% by Row	6.4%	8.5%	85.1%	100.0%
Spontaneous decision (last minute)	Count	417	799	3166	4382
	% by Row	9.5%	18.2%	72.3%	100.0%
Self Improvement activities	Count	217	625	3539	4381
	% by Row	5.0%	14.3%	80.8%	100.0%

GAY MEN: Destination Motivations

In this section, we want to understand which resources motivate you to visit. Please answer this section regarding your most recent vacation/holiday (not business travel) to your last destination. What influenced you to chose the destination over others?

		Major influence	Some influence	No influence	Total
Romance with partner	Count	731	784	1770	3285
	% by Row	22.3%	23.9%	53.9%	100.0%
Sexual adventure	Count	419	807	2060	3286
	% by Row	12.8%	24.6%	62.7%	100.0%
Food and wine	Count	697	1178	1405	3280
	% by Row	21.3%	35.9%	42.8%	100.0%
Visit family or friends	Count	1147	574	1583	3304
	% by Row	34.7%	17.4%	47.9%	100.0%
Gay/lesbian bars, clubs, parties, etc.	Count	676	963	1658	3297
	% by Row	20.5%	29.2%	50.3%	100.0%
Explore new destinations	Count	1165	827	1296	3288
	% by Row	35.4%	25.2%	39.4%	100.0%
Return to favorite destinations	Count	1275	751	1274	3300
	% by Row	38.6%	22.8%	38.6%	100.0%
Rest and relaxation	Count	1643	1053	609	3305
	% by Row	49.7%	31.9%	18.4%	100.0%
Mainstream event (festival, concert, etc.)	Count	434	564	2288	3286
	% by Row	13.2%	17.2%	69.6%	100.0%
LGBT event (Pride, film festival, etc.)	Count	422	409	2462	3293
	% by Row	12.8%	12.4%	74.8%	100.0%

Spa	Count	161	452	2662	3275
	% by Row	4.9%	13.8%	81.3%	100.0%
Gay accommodations or cruise	Count	478	525	2278	3281
	% by Row	14.6%	16.0%	69.4%	100.0%
Adventure travel (hiking, kayaking, cycling, etc.)	Count	373	700	2222	3295
	% by Row	11.3%	21.2%	67.4%	100.0%
Culture (art, architecture, music, theatre, etc.)	Count	964	1072	1270	3306
	% by Row	29.2%	32.4%	38.4%	100.0%
Shopping	Count	367	1069	1844	3280
	% by Row	11.2%	32.6%	56.2%	100.0%
Combined with a business trip	Count	200	288	2794	3282
	% by Row	6.1%	8.8%	85.1%	100.0%
Spontaneous decision (last minute)	Count	306	600	2375	3281
	% by Row	9.3%	18.3%	72.4%	100.0%
Self Improvement activities	Count	145	484	2647	3276
	% by Row	4.4%	14.8%	80.8%	100.0%

LESBIANS: Destination Motivations

In this section, we want to understand which resources motivate you to visit. Please answer this section regarding your most recent vacation/holiday (not business travel) to your last destination. What influenced you to chose the destination over others?

		Major influence	Some influence	No influence	Total
Romance with partner	Count	337	283	461	1081
	% by Row	31.2%	26.2%	42.6%	100.0%
Sexual adventure	Count	55	132	890	1077
	% by Row	5.1%	12.3%	82.6%	100.0%
Food and wine	Count	200	338	544	1082
	% by Row	18.5%	31.2%	50.3%	100.0%
Visit family or friends	Count	440	155	488	1083
	% by Row	40.6%	14.3%	45.1%	100.0%
Gay/lesbian bars, clubs, parties, etc.	Count	116	225	733	1074
	% by Row	10.8%	20.9%	68.2%	100.0%
Explore new destinations	Count	416	256	404	1076
	% by Row	38.7%	23.8%	37.5%	100.0%
Return to favorite destinations	Count	359	244	476	1079
	% by Row	33.3%	22.6%	44.1%	100.0%
Rest and relaxation	Count	593	301	185	1079
	% by Row	55.0%	27.9%	17.1%	100.0%
Mainstream event (festival, concert, etc.)	Count	140	181	758	1079
	% by Row	13.0%	16.8%	70.3%	100.0%
LGBT event (Pride, film festival, etc.)	Count	103	111	863	1077
	% by Row	9.6%	10.3%	80.1%	100.0%

Spa	Count	45	133	896	1074
	% by Row	4.2%	12.4%	83.4%	100.0%
Gay accommodations or cruise	Count	110	112	856	1078
	% by Row	10.2%	10.4%	79.4%	100.0%
Adventure travel (hiking, kayaking, cycling, etc.)	Count	193	235	654	1082
	% by Row	17.8%	21.7%	60.4%	100.0%
Culture (art, architecture, music, theatre, etc.)	Count	275	317	492	1084
	% by Row	25.4%	29.2%	45.4%	100.0%
Shopping	Count	106	288	686	1080
	% by Row	9.8%	26.7%	63.5%	100.0%
Combined with a business trip	Count	76	84	911	1071
	% by Row	7.1%	7.8%	85.1%	100.0%
Spontaneous decision (last minute)	Count	109	195	772	1076
	% by Row	10.1%	18.1%	71.7%	100.0%
Self Improvement activities	Count	71	136	873	1080
	% by Row	6.6%	12.6%	80.8%	100.0%

Media Motivators

When choosing your most recent trip, did any of the following influence you or motivate you to select that destination?

All LGBT PARTICIPANTS

		Major influence	Some influence	No influence	Total
LGBT Media: display ad, banner ad, blog or article	Count	344	769	3324	4437
	% by Row	7.8%	17.3%	74.9%	100.0%
Mainstream Media: display ad, banner ad, blog or article	Count	216	806	3363	4385
	% by Row	4.9%	18.4%	76.7%	100.0%
User generated review sites like Trip Advisor or Yelp	Count	254	701	3409	4364
	% by Row	5.8%	16.1%	78.1%	100.0%
Friend/family recommendation	Count	1274	947	2200	4421
	% by Row	28.8%	21.4%	49.8%	100.0%
Promotions on mobile devices like iPhone or iPad	Count	53	174	4188	4415
	% by Row	1.2%	3.9%	94.9%	100.0%
Promotions in LGBT bars or clubs	Count	179	419	3820	4418
	% by Row	4.1%	9.5%	86.5%	100.0%
Promotion at gay street festival or Pride	Count	207	377	3842	4426
	% by Row	4.7%	8.5%	86.8%	100.0%
Email newsletter broadcasts for LGBT community	Count	187	416	3800	4403
	% by Row	4.2%	9.4%	86.3%	100.0%
Tourism bureau's general website	Count	215	807	3387	4409
	% by Row	4.9%	18.3%	76.8%	100.0%

Tourism bureau's LGBT-specific website	Count	244	576	3587	4407
	% by Row	5.5%	13.1%	81.4%	100.0%
Twitter Posting	Count	27	101	4286	4414
	% by Row	0.6%	2.3%	97.1%	100.0%
Facebook posting	Count	86	290	4041	4417
	% by Row	1.9%	6.6%	91.5%	100.0%
A contest promoting the destination	Count	63	153	4172	4388
	% by Row	1.4%	3.5%	95.1%	100.0%

Media Motivators

When choosing your most recent trip, did any of the following influence you or motivate you to select that destination?

GAY MEN

		Major influence	Some influence	No influence	Total
LGBT Media: display ad, banner ad, blog or article	Count	261	629	2433	3323
	% by Row	7.9%	18.9%	73.2%	100.0%
Mainstream Media: display ad, banner ad, blog or article	Count	162	628	2492	3282
	% by Row	4.9%	19.1%	75.9%	100.0%
User generated review sites like Trip Advisor or Yelp	Count	198	538	2537	3273
	% by Row	6.0%	16.4%	77.5%	100.0%
Friend/family recommendation	Count	907	725	1675	3307
	% by Row	27.4%	21.9%	50.7%	100.0%
Promotions on mobile devices like iPhone or iPad	Count	40	139	3127	3306
	% by Row	1.2%	4.2%	94.6%	100.0%
Promotions in LGBT bars or clubs	Count	141	347	2817	3305
	% by Row	4.3%	10.5%	85.2%	100.0%
Promotion at gay street festival or Pride	Count	157	308	2850	3315
	% by Row	4.7%	9.3%	86.0%	100.0%
Email newsletter broadcasts for LGBT community	Count	138	326	2831	3295
	% by Row	4.2%	9.9%	85.9%	100.0%
Tourism bureau's general website	Count	147	604	2551	3302
	% by Row	4.5%	18.3%	77.3%	100.0%

Tourism bureau's LGBT-specific website	Count	190	460	2650	3300
	% by Row	5.8%	13.9%	80.3%	100.0%
Twitter Posting	Count	23	76	3207	3306
	% by Row	0.7%	2.3%	97.0%	100.0%
Facebook posting	Count	60	210	3032	3302
	% by Row	1.8%	6.4%	91.8%	100.0%
A contest promoting the destination	Count	47	122	3116	3285
	% by Row	1.4%	3.7%	94.9%	100.0%

Media Motivators

When choosing your most recent trip, did any of the following influence you or motivate you to select that destination?

LESBIANS

		Major influence	Some influence	No influence	Total
LGBT Media: display ad, banner ad, blog or article	Count	81	136	872	1089
	% by Row	7.4%	12.5%	80.1%	100.0%
Mainstream Media: display ad, banner ad, blog or article	Count	54	174	850	1078
	% by Row	5.0%	16.1%	78.8%	100.0%
User generated review sites like Trip Advisor or Yelp	Count	56	161	850	1067
	% by Row	5.2%	15.1%	79.7%	100.0%
Friend/family recommendation	Count	352	219	518	1089
	% by Row	32.3%	20.1%	47.6%	100.0%
Promotions on mobile devices like iPhone or iPad	Count	13	34	1037	1084
	% by Row	1.2%	3.1%	95.7%	100.0%
Promotions in LGBT bars or clubs	Count	34	72	982	1088
	% by Row	3.1%	6.6%	90.3%	100.0%
Promotion at gay street festival or Pride	Count	49	68	969	1086
	% by Row	4.5%	6.3%	89.2%	100.0%
Email newsletter broadcasts for LGBT community	Count	47	86	951	1084
	% by Row	4.3%	7.9%	87.7%	100.0%
Tourism bureau's general website	Count	67	201	814	1082
	% by Row	6.2%	18.6%	75.2%	100.0%

Tourism bureau's LGBT-specific website	Count	51	116	915	1082
	% by Row	4.7%	10.7%	84.6%	100.0%
Twitter Posting	Count	4	24	1055	1083
	% by Row	0.4%	2.2%	97.4%	100.0%
Facebook posting	Count	24	79	987	1090
	% by Row	2.2%	7.2%	90.6%	100.0%
A contest promoting the destination	Count	16	31	1032	1079
	% by Row	1.5%	2.9%	95.6%	100.0%

You indicated that the LGBT media was a motivator. Can you be more specific on what type of media influenced you?

ALL LGBT PARTICIPANTS

		Major influence	Some influence	No influence	Total
Display ad in LGBT print magazine	Count	138	95	98	331
	% by Row	41.7%	28.7%	29.6%	100.0%
Article in LGBT print magazine	Count	124	91	112	327
	% by Row	37.9%	27.8%	34.3%	100.0%
Banner ad on LGBT website	Count	107	81	134	322
	% by Row	33.2%	25.2%	41.6%	100.0%
Article on LGBT website	Count	138	86	104	328
	% by Row	42.1%	26.2%	31.7%	100.0%
Blog on LGBT website	Count	68	51	205	324
	% by Row	21.0%	15.7%	63.3%	100.0%
Video on LGBT website	Count	52	51	220	323
	% by Row	16.1%	15.8%	68.1%	100.0%
TV show on LGBT station	Count	35	53	236	324
	% by Row	10.8%	16.4%	72.8%	100.0%
Display ad in LGBT guidebook	Count	62	76	184	322
	% by Row	19.3%	23.6%	57.1%	100.0%
LGBT travel map	Count	70	69	187	326
	% by Row	21.5%	21.2%	57.4%	100.0%

You indicated that the mainstream media was a motivator. Can you be more specific on what type of media influenced you?

ALL LGBT PARTICIPANTS





		Major influence	Some influence	No influence	Total
Display ad in mainstream print magazine	Count	64	58	80	202
	% by Row	31.7%	28.7%	39.6%	100.0%
Article in mainstream print magazine	Count	77	48	72	197
	% by Row	39.1%	24.4%	36.5%	100.0%
Banner ad on mainstream website	Count	51	38	108	197
	% by Row	25.9%	19.3%	54.8%	100.0%
Article on mainstream website	Count	73	51	76	200
	% by Row	36.5%	25.5%	38.0%	100.0%
Blog on mainstream website	Count	27	42	133	202
	% by Row	13.4%	20.8%	65.8%	100.0%
Video on mainstream website	Count	40	40	120	200
	% by Row	20.0%	20.0%	60.0%	100.0%
TV show on mainstream station	Count	52	33	116	201
	% by Row	25.9%	16.4%	57.7%	100.0%
Display ad in mainstream guidebook	Count	44	41	117	202
	% by Row	21.8%	20.3%	57.9%	100.0%
Mainstream travel map	Count	45	40	116	201
	% by Row	22.4%	19.9%	57.7%	100.0%

Purchase Method Behaviors for Travel

While it is no surprise that over 80% of gay men and lesbians purchased their last vacation online, it may surprise some travel companies that the majority of participants visited and compared at least three websites before making the purchase. Only 25% visited one website and purchased their travel products there.

How did you purchase your most recent vacation/holiday. Mark all that apply. (Respondents were allowed to choose multiple responses)










ALL LGBT PARTICPANTS

Response	Chart	Frequency	Count
Online/internet		80.3%	3615
By phone to airlines and hotels		11.2%	506
By phone or visit to local retail travel agency		10.6%	475
By phone or visit to group tour or cruise operator		4.7%	211

How many sites did you compare before you booked your last trip.

		1	2	3	4	5	6	7 or more	Total
Number of sites	Count	861	734	959	435	172	43	274	3478
	% by Row	24.8%	21.1%	27.6%	12.5%	4.9%	1.2%	7.9%	100.0%












What online methods of booking did you use for your most recent vacation.

Response	Chart	Frequency	Count
Hotel website		52.2%	1878
Airline website		46.7%	1680
Mainstream online booking service (e.g. Travelocity, Orbitz, Zuji, Travel24, etc.)		32.2%	1158
Discount online booking service (Priceline, Hotwire, lastminute.com, etc.)		22.2%	800
Rental car website		15.9%	572
LGBT website with booking service		7.1%	257
Tourism office website with booking service		5.5%	199
Retail travel agency website (jt.de, uniglobe.com, etc.)		4.1%	146
Smartphone or mobile apps		2.9%	106

Type of Hotel Purchased

During your last leisure vacation, in what type of accommodation(s) did you stay? Select all that apply for that particular trip. (Respondents were allowed to choose multiple responses)






All LGBT PARTICIPANTS

Response	Chart	Frequency	Count
Mid-range hotel		28.4%	1267
Luxury hotel		22.8%	1017
Stayed free with family or friends		15.7%	703
Boutique hotel		10.7%	477
Budget hotel		10.0%	447
LGBT guesthouse/hotel		8.8%	395
Rented apartment/condo		8.2%	366
Motel		6.3%	280
My own time-share or fractional ownership unit		3.8%	170
Paid “couch surfing” or room in a private home		1.2%	55
Home swap		0.4%	16
Valid Responses			4464

Type of Transportation Used



For your last leisure vacation, what type of transportation did you use to get to the destination? (Respondents were allowed to choose multiple responses)

All LGBT PARTICIPANTS

Response	Chart	Frequency	Count
Airline flight		55.2%	2462
Personal car		36.4%	1623
Rental car		11.9%	533
Train		6.2%	275
Bus		4.5%	203
		Valid Responses	4464

Did you use points or miles to pay for part or all of your most recent trip?

All LGBT PARTICIPANTS

Response	Chart	Frequency	Count
No		84.1%	3717
Yes		15.9%	704
Not Answered			43
		Valid Responses	4421

Social Media Behavior and Influences

By far, Facebook is the most popular social media website used by the LGBT community, with gay men and lesbians using Facebook relatively equally.

In what ways did you share the experience of your trip with others? I wrote about my trip on... (Check all that apply.)

ALL LGBT PARTICIPANTS

		During my trip	After my trip	Total
Facebook	Count	1469	1614	4464
	% by Row	32.9%	36.2%	100.0%
Twitter	Count	219	234	4464
	% by Row	4.9%	5.2%	100.0%
Other review sites like Trip Advisor or Yelp	Count	105	357	4464
	% by Row	2.4%	8.0%	100.0%
Postcards	Count	643	222	4464
	% by Row	14.4%	5.0%	100.0%
Posted my trip pictures and/or videos on Facebook	Count	943	1278	4464
	% by Row	21.1%	28.6%	100.0%
Photo sites like Picasa or Kodak gallery	Count	159	411	4464
	% by Row	3.6%	9.2%	100.0%
Posted photos on my own blog or website	Count	183	394	4464
	% by Row	4.1%	8.8%	100.0%
Posted photos on LGBT website	Count	49	188	4464
	% by Row	1.1%	4.2%	100.0%

In what ways did you share the experience of your trip with others? I wrote about my trip on... (Check all that apply.)

GAY MALE PARTICIPANTS

		During my trip	After my trip	Total
Facebook	Count	1070	1149	3331
	% by Row	32.1%	34.5%	100.0%
Twitter	Count	150	170	3331
	% by Row	4.5%	5.1%	100.0%
Other review sites like Trip Advisor or Yelp	Count	82	278	3331
	% by Row	2.5%	8.3%	100.0%
Postcards	Count	473	157	3331
	% by Row	14.2%	4.7%	100.0%
Posted my trip pictures and/or videos on Facebook	Count	674	886	3331
	% by Row	20.2%	26.6%	100.0%
Photo sites like Picasa or Kodak gallery	Count	117	297	3331
	% by Row	3.5%	8.9%	100.0%
Posted photos on my own blog or website	Count	134	285	3331
	% by Row	4.0%	8.6%	100.0%
Posted photos on LGBT website	Count	36	146	3331
	% by Row	1.1%	4.4%	100.0%



In what ways did you share the experience of your trip with others? I wrote about my trip on... (Check all that apply.)

LESBIANS

		During my trip	After my trip	Total
Facebook	Count	394	453	1107
	% by Row	35.6%	40.9%	100.0%
Twitter	Count	67	60	1107
	% by Row	6.1%	5.4%	100.0%
Other review sites like Trip Advisor or Yelp	Count	22	75	1107
	% by Row	2.0%	6.8%	100.0%
Postcards	Count	166	61	1107
	% by Row	15.0%	5.5%	100.0%
Posted my trip pictures and/or videos on Facebook	Count	266	385	1107
	% by Row	24.0%	34.8%	100.0%
Photo sites like Picasa or Kodak gallery	Count	42	109	1107
	% by Row	3.8%	9.8%	100.0%
Posted photos on my own blog or website	Count	48	108	1107
	% by Row	4.3%	9.8%	100.0%
Posted photos on LGBT website	Count	12	40	1107
	% by Row	1.1%	3.6%	100.0%

Did you use an iPhone or other “smartphone”-type mobile device while preparing for your trip or while traveling?

ALL LGBT PARTICIPANTS

Response	Chart	Frequency	Count
No		60.9%	2702
Yes		39.1%	1734
Not Answered			28
		Valid Responses	4436
		Total Responses	4464

What did you use your smartphone for? Check all that apply.

ALL LGBT PARTICIPANTS




		Before trip	While traveling	Total
View official destination tourism websites	Count	258	292	1749
	% by Row	14.8%	16.7%	100.0%
Researching a destination	Count	497	616	1749
	% by Row	28.4%	35.2%	100.0%
Booking flights	Count	161	80	1749
	% by Row	9.2%	4.6%	100.0%
Flight alerts (change of time, gate, etc.)	Count	455	620	1749
	% by Row	26.0%	35.4%	100.0%
Booking hotels	Count	192	128	1749
	% by Row	11.0%	7.3%	100.0%
Finding local mainstream resources (restaurants, attractions, etc.) at the destination	Count	347	897	1749
	% by Row	19.8%	51.3%	100.0%

Finding LGBT resources (gay bars, restaurants, clubs, etc.) at the destination (e.g. Damron or GayCities)	Count	302	590	1749
	% by Row	17.3%	33.7%	100.0%
Online Maps (mainstream)	Count	405	894	1749
	% by Row	23.2%	51.1%	100.0%
Online LGBT maps (e.g. FunMaps, Friends Maps or GMaps360)	Count	117	226	1749
	% by Row	6.7%	12.9%	100.0%
Staying in touch about the trip by email and/or texting	Count	673	1150	1749
	% by Row	38.5%	65.8%	100.0%
Hooking up at the destination	Count	151	408	1749
	% by Row	8.6%	23.3%	100.0%
Foreign language translation	Count	53	136	1749
	% by Row	3.0%	7.8%	100.0%
Foreign currency convertors	Count	113	183	1749
	% by Row	6.5%	10.5%	100.0%
Posting updates to Facebook	Count	495	884	1749
	% by Row	28.3%	50.5%	100.0%
Tweeting about your travels	Count	93	161	1749
	% by Row	5.3%	9.2%	100.0%
Uploading photos or videos	Count	297	837	1749
	% by Row	17.0%	47.9%	100.0%
"Checking in" with Foursquare, etc.	Count	89	198	1749
	% by Row	5.1%	11.3%	100.0%

Email or Text Alert Marketing

Would you be interested in an email or text alert system where you register your trip with a travel company to receive special offers and promotions from local businesses that are valid during your intended stay?

ALL LGBT PARTICIPANTS
















Response	Chart	Frequency	Count
Very interested		26.4%	1127
Somewhat interested		48.1%	2056
Not interested		25.6%	1093
Not Answered			39
		Valid Responses	4276

LGBT Events, Meetings and Conferences

Over 20% of LGBT travelers indicated that they traveled to another city and spent a night or more to attend Pride events in the past 12 months. With more and more LGBT professional and association conferences and meetings in development every year, nearly 6% of LGBT survey participants indicated they traveled to another city to attend such a meeting. That is more than are traveling to LGBT sporting events or circuit/dance events.

In the past 12 months, have you traveled to another city (requiring an overnight stay) to attend any of the following community events? Please mark all that apply.
(Respondents were allowed to choose multiple responses)









ALL LGBT PARTICIPANTS

Response	Chart	Frequency	Count
LGBT Pride event		19.0%	837
LGBT cultural, arts, or film event		8.3%	368
An LGBT themed event (like Gay Days in Orlando)		6.6%	290
A bear community event		5.6%	248
LGBT professional association meeting or conference		5.5%	241
An LGBT circuit party / dance event		5.2%	229
A leather community event		5.0%	219
A lesbian community event		2.9%	129
A gay rodeo		2.6%	114
LGBT sports tournament (like volleyball or softball)		1.9%	84
An event for LGBT families		1.5%	66
LGBT sports event (like Winter Pride in Whistler)		1.5%	65
An “Imperial Court” event		1.1%	49
A transgender community event		0.7%	33
A bisexual community event		0.6%	26

LGBT Events, Meetings and Conferences – Hotel Stays

Let's look at the most recent event you attended in another city. How many nights did you stay in a hotel on that trip? (If you stayed with a friend or just visited for the day, select zero.)

ALL LGBT PARTICIPANTS

Response	Chart	Frequency	Count
0 (day trip, or did not stay in a hotel)		20.7%	309
1		10.9%	162
2		22.1%	330
3		17.9%	266
4		11.6%	173
5		6.8%	101
6		2.6%	39
7+		7.4%	110
Valid Responses			1490

Hotel Purchase Motivators

When making a hotel reservation for leisure travel, what are the top motivators influencing you to choose one hotel over another?

ALL LGBT PARTICIPANTS

		Does not motivate	Somewhat motivating	Very Motivating	Total
Price	Count	187	1102	2931	4220
	% by Row	4.4%	26.1%	69.5%	100.0%
Hotel brand reputation as LGBT-friendly	Count	694	2146	1376	4216
	% by Row	16.5%	50.9%	32.6%	100.0%
Hotel brand's customer loyalty program/points	Count	1639	1549	995	4183
	% by Row	39.2%	37.0%	23.8%	100.0%
Hotel's location near tourist attractions	Count	505	1950	1729	4184
	% by Row	12.1%	46.6%	41.3%	100.0%
Hotel's location near LGBT neighborhood	Count	1109	2001	1094	4204
	% by Row	26.4%	47.6%	26.0%	100.0%
Hotel brand's reputation as being more upscale	Count	1101	2009	1083	4193
	% by Row	26.3%	47.9%	25.8%	100.0%
Hotel advertising in LGBT print and/or Internet media.	Count	1250	2170	776	4196
	% by Row	29.8%	51.7%	18.5%	100.0%
Hotel's affiliation or rating with organizations like IGLTA, TAG or HRC	Count	1815	1800	570	4185
	% by Row	43.4%	43.0%	13.6%	100.0%

Availability of hotel gym	Count	2289	1385	517	4191
	% by Row	54.6%	33.0%	12.3%	100.0%
Free Internet access	Count	880	1644	1689	4213
	% by Row	20.9%	39.0%	40.1%	100.0%
Referral from friend	Count	739	2067	1389	4195
	% by Row	17.6%	49.3%	33.1%	100.0%
Review of property on Internet	Count	577	1869	1766	4212
	% by Row	13.7%	44.4%	41.9%	100.0%

Elements of a Hotel Package that Are Attractive to the LGBT Community

By far price, food, and alcohol-related incentives were more motivating than incentives such as passes to gay events, donations to LGBT non-profits, and LGBT magazine subscriptions.

Many hotels are creating “packages” for the LGBT community. The following is a list of elements that might be included in a package. Which incentives motivate you to purchase a hotel package?

ALL LGBT PARTICIPANTS




		Not Motivating	Somewhat Motivating	Very Motivating	Total
10% discount on price of the room	Count	994	2548	640	4182
	% by Row	23.8%	60.9%	15.3%	100.0%
20% discount on price of the room	Count	247	1363	2629	4239
	% by Row	5.8%	32.2%	62.0%	100.0%
Buy two nights get a third free	Count	333	1649	2239	4221
	% by Row	7.9%	39.1%	53.0%	100.0%
Special LGBT event, like tickets to a gay party or VIP pass to a club	Count	1314	1840	1067	4221
	% by Row	31.1%	43.6%	25.3%	100.0%
Pass to local gym	Count	2505	1213	493	4211
	% by Row	59.5%	28.8%	11.7%	100.0%
Printed guide or map to local LGBT community	Count	1482	2092	646	4220
	% by Row	35.1%	49.6%	15.3%	100.0%
Subscription to LGBT publication like Advocate Magazine	Count	2370	1425	410	4205
	% by Row	56.4%	33.9%	9.8%	100.0%

Donation to, or membership in, LGBT organization like HRC or local charity	Count	1690	1868	663	4221
	% by Row	40.0%	44.3%	15.7%	100.0%
Free welcome cocktails	Count	1648	1706	877	4231
	% by Row	39.0%	40.3%	20.7%	100.0%
Bottle of wine or other amenity in the room	Count	1357	1782	1096	4235
	% by Row	32.0%	42.1%	25.9%	100.0%
Free Breakfast	Count	428	1830	2005	4263
	% by Row	10.0%	42.9%	47.0%	100.0%
\$25 credit per night at the hotel restaurant	Count	618	1831	1786	4235
	% by Row	14.6%	43.2%	42.2%	100.0%

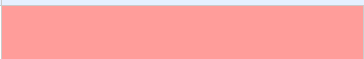


Travel with Pets

Did you travel with your pet or companion animal in the past 12 months, involving an overnight hotel stay?

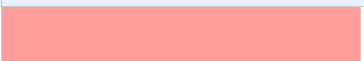


ALL LGBT PARTICIPANTS

Response	Chart	Frequency	Count
No, I do not have a pet / companion animal		44.2%	1912
No, I have a pet / companion animal but did not take him or her on an overnight trip		43.9%	1900
Yes		12.0%	518
Not Answered			22
		Valid Responses	4330

Gay Men: Which animal(s) did you travel with?



Response	Chart	Frequency	Count
Dog(s)		87.4%	285
Cat(s)		6.1%	20
Other animal(s)		1.5%	5
		Valid Responses	326

Lesbians: Which animal(s) did you travel with?

Response	Chart	Frequency	Count
Dog(s)		87.4%	167
Cat(s)		10.5%	20
Other animal(s)		2.1%	4
		Valid Responses	191



Did you research and travel to destinations that were “pet-friendly?”

ALL LGBT PARTICIPANTS

Response	Chart	Frequency	Count
Yes		85.3%	436
No		14.7%	75
Not Answered			7
		Valid Responses	511





Did you research and book hotels that were “pet-friendly?”

ALL LGBT PARTICIPANTS





Response	Chart	Frequency	Count
Yes		88.6%	453
No		11.4%	58
Not Answered			7
		Valid Responses	511

Did you use your passport in the past 12 months? Mark all that apply.

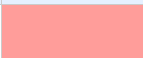



ALL LGBT PARTICIPANTS

Response	Chart	Frequency	Count
I have a passport, but I did not use it in the past 12 months		36.8%	1598
Yes, for travel to another continent		28.2%	1227
Yes, for travel to a country on the continent where I live		24.0%	1045
I DO NOT HAVE A PASSPORT		18.9%	820
		Valid Responses	4347

GAY MEN

Response	Chart	Frequency	Count
I have a passport, but I did not use it in the past 12 months		36.4%	1184
Yes, for travel to another continent		31.4%	1021
Yes, for travel to a country on the continent where I live		25.7%	834
I DO NOT HAVE A PASSPORT		15.8%	515
		Valid Responses	3250

LESBIANS

Response	Chart	Frequency	Count
I have a passport, but I did not use it in the past 12 months		37.8%	405
I DO NOT HAVE A PASSPORT		27.5%	295
Yes, for travel to a country on the continent where I live		19.2%	206
Yes, for travel to another continent		19.0%	204
		Valid Responses	1071

Tourist Activities When in a Destination

When traveling to a city, how likely are you to participate in the following activities?

ALL LGBT PARTICIPANTS

		Not likely	Somewhat likely	Very likely	Total
Go to the LGBT neighborhood	Count	353	1693	2186	4232
	% by Row	8.3%	40.0%	51.7%	100.0%
Go to a gay bar or nightclub	Count	636	1702	1898	4236
	% by Row	15.0%	40.2%	44.8%	100.0%
Go to a straight bar or nightclub	Count	2339	1417	470	4226
	% by Row	55.3%	33.5%	11.1%	100.0%
Visit the popular mainstream tourist attractions	Count	273	1848	2107	4228
	% by Row	6.5%	43.7%	49.8%	100.0%
Go to a museum	Count	453	1981	1804	4238
	% by Row	10.7%	46.7%	42.6%	100.0%
Go to a concert or play	Count	858	2250	1126	4234
	% by Row	20.3%	53.1%	26.6%	100.0%
Go to a neighborhood restaurant	Count	73	1189	2983	4245
	% by Row	1.7%	28.0%	70.3%	100.0%
Go to an upscale chain restaurant	Count	1417	1899	912	4228
	% by Row	33.5%	44.9%	21.6%	100.0%
Go shopping in city's retail district	Count	557	1977	1711	4245
	% by Row	13.1%	46.6%	40.3%	100.0%
Go to a gym	Count	2560	1192	469	4221
	% by Row	60.6%	28.2%	11.1%	100.0%
Go on a day trip outside the city	Count	652	2256	1326	4234
	% by Row	15.4%	53.3%	31.3%	100.0%

Take a city tour	Count	1224	2015	991	4230
	% by Row	28.9%	47.6%	23.4%	100.0%
Rent sports equipment such as bike, canoe, kayak, etc.	Count	2464	1447	319	4230
	% by Row	58.3%	34.2%	7.5%	100.0%
Use a GPS-enabled smartphone device, like iPhone, to meet others (using apps such as Grindr, FourSquare, etc)	Count	2575	751	894	4220
	% by Row	61.0%	17.8%	21.2%	100.0%

ABOUT COMMUNITY MARKETING, INC.

The facts are plain: As a niche market segment, gay men and lesbians have a significant amount of disposable income. Most critically, their dollars go to product and service suppliers that recognize their unique buying preferences and offer them differentiated value.

Community Marketing, Inc. has been helping a wide variety of industry leaders master the subtleties of this market since 1992. Our unique and specialized services are based on over 18 years of experience and case studies, and include market research (online surveys, focus groups, intercepts, interviews, advisory boards, etc.), with our proprietary panel of 50,000 LGBT consumers; strategic consulting; marketing planning; media buying; and marketing plan management. We produce custom, on-site training sessions, develop conferences, symposia and webinars, and speak at industry events.

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 the LGBT community comprises 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. 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 LGBT market research and development. Through the company’s tireless efforts since 1992, “doors have opened” around the world for gay and lesbian consumers. We have helped grow LGBT market recognition through research, media relations and education; and have brought opportunities to many of the world’s leading marketers.

CMI’s LGBT Market Research + Development Lab® projects include:

- ABSOLUT (Pernod Ricard)
- Bridgestone Corporation
- Cirque du Soleil
- Chicago History Museum
- Chubb Insurance Group of Companies
- E. & J. Gallo Winery / Barefoot Wines
- Ernst & Young
- Greater Philadelphia Tourism Marketing Corporation
- Harrah’s Entertainment
- Hyatt Hotels & Resorts
- Japan Air Lines
- Japan National Tourism Organization
- LA, Inc.
- MillerCoors Brewing Company
- New York Life
- NYC & Co.
- Starwood Hotels & Resorts
- Switzerland Tourism
- Travelocity
- U.S. Government (Census Bureau)
- U.S. Government (Housing & Urban Development)
- Wells Fargo Bank

And many others

LGBT Market Research:

There is a difference!

Market research studies and resulting statistics are meant to help marketers understand the LGBT communities, and influence educated decisions about their strategies and tactics. However, *not all research is the same*. Community Marketing's **LGBT Market Research + Development Lab®** methodologies and experience are distinct from those of others when considering approaches, respondent panels—and ultimately—the validity and utility of sought-after results.

WHO ARE YOU TALKING TO?

Community Marketing, Inc. (CMI) has developed our proprietary consumer panel over the past 18+ years by circulating field surveys at leading LGBT events, and by partnering with LGBT organizations and media across the USA, Canada, the UK, and around the world. These partners distribute our survey invitations via print ads, web banners, email broadcasts and social networks to their memberships and/or readers. The resulting panels are highly representative of LGBT consumers who interact with the LGBT community and media. *This is important:* 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. CMI research is trusted by—and frequently quoted in—the *New York Times*, *Chicago Tribune*, *Los Angeles Times*, *Miami Herald*, *USA Today*, the *Wall Street Journal*, *Brand Week*, CBS News, Associated Press, etc.

Other providers typically send out widely distributed panel invitations (via Yahoo, etc.), and then sort for those who trust the researcher enough to indicate that they are gay or lesbian in the context of a survey. This approach, attempting to "represent the gay community at large," may be appropriate for direction in sociological or academic studies, but not for developing clear, representative advertising or marketing related strategies. Other researchers use lists from one or two LGBT publishers, which may skew results. For marketers desiring valid LGBT consumer insights about products, services, advertising creative and marketing strategies, these panel development approaches are not likely to yield LGBT community members who are interacting with the media where you are placing ads.

IN RESEARCH, SIZE DOES MATTER.

CMI has conducted over a hundred LGBT-dedicated research studies since the early '90s, covering a wide variety of topics, industries and interests. Through our work, we both observe and influence the trends of this market. Size does matter in the case of research. Our research panel has grown to over 50,000 qualified LGBT consumers, the largest of its kind, by far. Our 4th Annual LGBT Community Survey® study attracted over 45,000 survey participants, representing 100+ countries, making it the largest such study in history. We leverage our long history / experience / expertise for your benefit, and fine-tune our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Without access to this enormous resource of qualified LGBT consumer panelists, other companies have to compromise on the quality and demographic representation of the panel, or "reinvent the wheel" at your expense. One cannot fathom the diversity and complexities within LGBT (see below) on a small sample. And with small samples, you lose the opportunity to derive statistically-significant cross tabs on gender, geographical location, age, income, experience, product choice, etc. Can you really make the assumption that a 28 year old lesbian in Seattle has the same purchasing motivations and behaviors as a 67 year old gay man in Atlanta? Generalities and sweeping statements about "the gay market" based on comparatively small samples can distort the results of research findings, potentially wasting your investment of time and resources.

DIVERSITY: THERE IS NO "LGBT MARKET"

Community Marketing emphasizes that there is no "gay market," just as there is no singular "Asian market." The LGBT communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Those, plus variations in geographical location, age, income, relationship status, gender identity and more, make it even more important to discover which opportunities *within LGBT* will help you achieve your goals. Fine tuning your approaches based on highly refined and well-targeted matches within LGBT will make your outreach initiatives more efficient and cost-effective, and will significantly improve your marketing ROI.

General surveys on "the gay market" are likely to only scratch the surface of the diversity and varieties of opportunities marketers can enjoy if properly explored and understood.

continues...

TWO SIDES OF THE COIN: QUANTITATIVE AND QUALITATIVE

Since 1994, CMI has taken pride in operating the most consistent, longest-running series of LGBT community surveys in the world. But we don't stop there. *Quantitative* (data) research is one important side of a coin, but only tells half of the story. The other side of a comprehensive research initiative involves *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, Mexico, Australia, Britain and Germany, as well as many secondary markets. We've found that the same creative, tested in different regions, often yields substantially differing results. 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 LGBT focus group studies and other *qualitative* research options. We have developed and reported on focus groups covering a wide variety of topics, plus we have operated telephone interviews, field surveys, advisory board series and multi-year customer satisfaction survey projects which can round out a comprehensive market intelligence plan.

Producing only online surveys, other research companies are telling 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 are only uncovered in qualitative research... extremely important considerations that averages and extrapolated assumptions based only on survey statistics are likely to miss.

WE DON'T OUTSOURCE!

Community Marketing maintains our own research panels and utilizes advanced, sophisticated research software. We do all of our research in-house, because nobody knows this market segment as well as we do. We never sell or rep another company's services, nor will we outsource your project to a 3rd party.

Some firms work as reps of research companies, or outsource clients' projects, and report on the results of the 3rd party's work. But without being intimately involved in every aspect of the project, from discussing the client's goals and designing the study, to building the survey, implementing it and writing the report, and without engaging directly with consumers in focus groups, it is difficult to gain the insights that can only come from CMI's hands-on LGBT research specialization spanning nearly two decades.

TRUSTED

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

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 the community's leading business and advocacy organizations, events and conferences, such as Out & Equal, HRC, National Gay & Lesbian Chamber of Commerce, GLAAD, International Gay & Lesbian Travel Association, National Lesbian & Gay Journalists Association, etc. This community connection is not only the right thing to do, it is essential for initiating appropriate relationships for our clients.

VALUE

You'd think that with this kind of specialization and experience, you'd be investing considerably more for CMI services than for research from other companies. But it is due to our specific focus on LGBT market intelligence, and the cumulative 60+ years of dedicated LGBT research among the CMI team, that we can actually keep your costs low. We are not spending your money to locate qualified survey or focus group participants, nor are we spending our time (or your money) trying to source comparative data or case studies. We've done all that over the past 18 years for your benefit. And we are not running a large operation that juggles many accounts and projects of differing scope and focus. CMI's client dedication and market specialization delivers you superior intelligence at a fraction of the cost of other firms.

CMI's LGBT Consumer Panel

The facts are plain:

Gay men and lesbians own more homes and cars, travel more, spend more on electronics, and have **the largest amount of disposable income of any niche market**. And it's a sizeable niche: LGBT consumers make up 5% to 10% of the U.S. consumer market. Community Marketing will help you connect with this influential demographic.

- **Accurate, targeted market intelligence**

Utilizing quantitative and qualitative market research methodologies, Community Marketing helps companies better understand and more effectively reach the LGBT community. Our consumer panel provides insights through online surveys, focus groups, intercepts and more.

- **The largest, most representative panel**

With nearly 20 years in business, Community Marketing has developed a research panel of more than **50,000** LGBT consumers. We've partnered with media outlets and LGBT-oriented organizations and events throughout the country and around the world to recruit our qualified panel that's geographically representative of the LGBT population.

- **Candid responses, honest feedback**

As an LGBT-owned and -operated firm, we've established trust with our panelists. We speak their language and know how to communicate effectively with them. As a result, our panelists are willing to talk with us frankly and frequently, even about sensitive issues.

- **About Community Marketing, Inc.**

Since 1992, Community Marketing has provided market research, strategic consulting and marketing planning services to a wide variety of clients. We've provided LGBT consumer intelligence to market leaders like Wells Fargo Bank, ABSOLUT, New York Life, MillerCoors, Japan Airlines and Hyatt Hotels, as well as the US Government (Census Bureau). We've completed hundreds of custom quantitative and qualitative research projects for clients worldwide. We also present public and custom on-site educational seminars and workshops. In the past year, Community Marketing produced LGBT marketing symposia on four continents.

Learn more on our website,
www.communitymarketinginc.com.

50,000+

Gay, lesbian, bisexual
and transgender consumers

45 median age

71% college grads

84% are employed

66% hhi >\$50K

60% own a home

46% live with partner

88% own a car

69% drink at bars
and restaurants

spend **\$100** at bars &
restaurants per week

37% make purchasing
decisions at work

67% are on facebook

12 mo. purchases

smart phone: 30%

laptop computer: 29%

hdtv: 27%

running shoes: 36%