



CMI Community Marketing & Insights

Leaders in LGBTQ Research since 1992

LGBTQ Tourism: *Research Review*



Thomas Roth, MBA

Founder, Community Marketing & Insights



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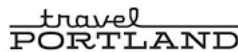
- San Francisco-based, LGBTQ Founded & Operated, since 1992
- Serves corporate, university, organization and government institution clients throughout the USA, Canada, Europe, Asia and Australia
- 25+ years of consumer research, strategic consulting, marketing planning, communications, and training services
- Dedicated research panel of 90,000+ LGBTQ consumers
- Online surveys, focus groups, virtual focus groups, in-depth interviews, intercepts and other methodologies

*Research, development, communications and marketing strategies.
Proudly serving industry leaders since 1992*

Some of CMI's LGBTQ Tourism Research, Education & Marketing Clients



GREATER
FORT LAUDERDALE



You might ask...

Why does the LGBTQ community receive so much attention in the travel Industry?

- ✓ Mostly DINK “Dual Income - No Kids”... but that is changing
- ✓ Travel as part of cultural identity
- ✓ Perception of greater income / wealth
- ✓ Targeted outreach opportunities
- ✓ Exceptionally brand / destination loyal
- ✓ Although only 3-6% of the adult population, surveys show our travel patterns are nearly double the average population.

These shared attributes are what makes LGBTQ an attractive “market.”

In LGBTQ Marketing: How are we the same? How are we different?



***LGBTQ is part
of diversity.***

In LGBTQ Marketing: How are we the same? How are we different?



*LGBTQ is part
of **diversity**.*

***Diversity** is
part of LGBTQ.*

The LGBTQ Community is Diversifying Over Time

Gay & Lesbian



GLBT



LGBT



LGBTQ



LGBTQ+

LGBTQIA+

LGBTQ2+



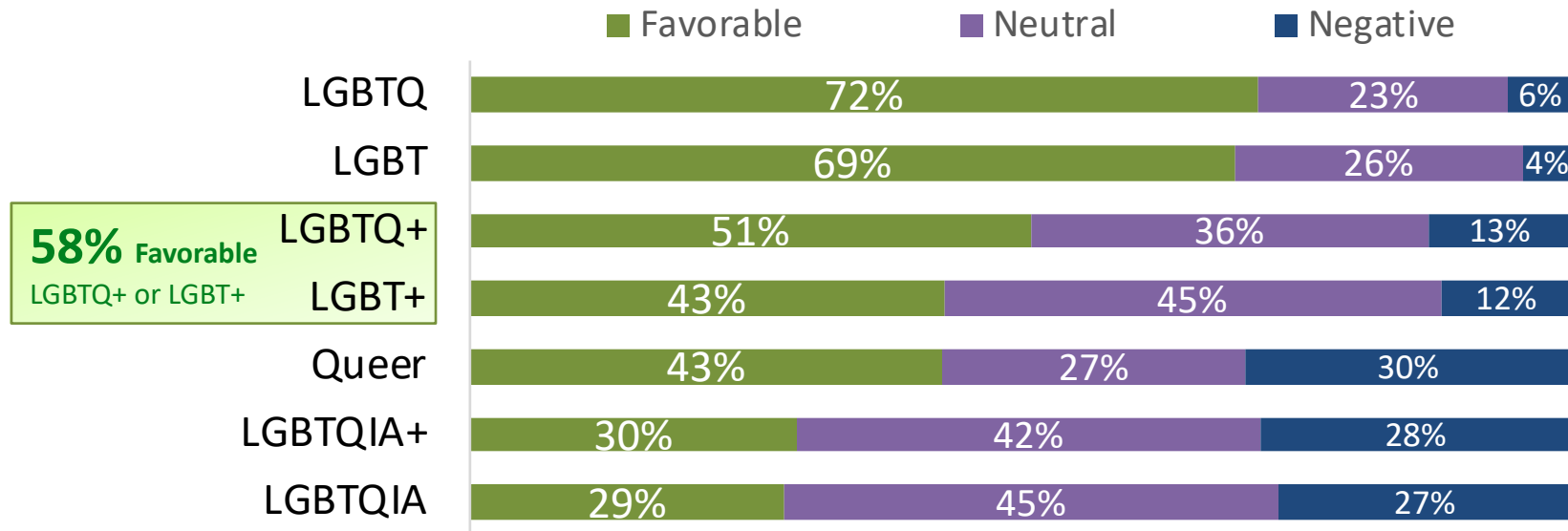
???

- Lesbian or Gay Woman
- Gay man
- Bisexual woman
- Bisexual man
- Pansexual
- Asexual
- Non-binary sexual orientation
- Same Gender Loving
- Heterosexual / Straight man
- Heterosexual / Straight woman
- Questioning
- Other: Please tell us
- Female
- Male
- Transgender
- Transsexual
- Trans Man
- Trans Woman
- Intersex
- Non-binary gender identity
- Genderqueer
- Gender Fluid
- Agender
- Questioning
- Other: Please tell us
- Queer
- Straight Ally
- Other: Please tell us

USA Annual Terminology Update: 2019

The following terms are often used to describe our community. Please rate how you feel about each, when you see them used by corporations, non-profits or in the media. Mark all that apply.

My opinion of the use of the terms...



Language *matters* in LGBTQ communications.

Let's talk about some terms.

OK:	LGBT, LGBTQ, LGBT+, LGBTI, lesbian, gay, bisexual, transgender
	partner, husband/wife, marriage equality
	sexual orientation, gender identity
Not OK:	GLBT, sexual preference, alternative lifestyle
	your friend, those people, that market
	transgendered, homosexual, "gay marriage"
Caution:	queer, lifestyle
	gay neighborhood; overuse of the word "gay" in materials

Outreach to the Lesbian Community • Among Lesbian Participants



● Agree

● Neutral

● Disagree

Corporations/companies do a good job
outreaching to the **lesbian community**

5%

37%

58%

I would be more likely to support and
purchase from companies that market to
and support the **lesbian community**

90%

9% 1%

African American LGBTQ Participants

Corporate America does a good job
outreaching to the
LGBTQ African American /
Black Community

Agree 4%
Neutral 19%
Disagree 77%

Latinx American LGBTQ Participants

Corporate America does a good job
outreaching to the LGBTQ Latino /
Hispanic Community

Agree 8%
Neutral 37%
Disagree 55%

Asian American LGBTQ Participants

Corporate America does a good job
outreaching to the
LGBTQ Asian Community

Agree 3%
Neutral 18%
Disagree 80%

I would be more likely to
support and purchase from
companies that market to and
support the LGBTQ Black /
African American community

Agree 79%
Neutral 17%
Disagree 4%

I would be more likely to support and
purchase from companies that market to
and support the LGBTQ Latino / Hispanic
community

Agree 79%
Neutral 19%
Disagree 2%

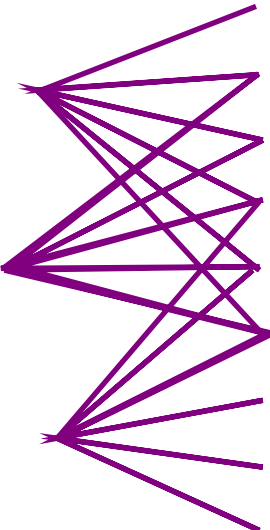
I would be more likely to support and
purchase from companies that market
to and support the LGBTQ Asian
community

Agree 74%
Neutral 23%
Disagree 3%

Exploring Major Segments *within* the LGBTQ Market

Success comes from identifying and reaching your best customers

Lesbians
Gay Men
Bisexual
Transgender



- Millennials
- Gen X
- Baby Boomers
- Urban
- Suburban
- Rural/Small Town
- Latino
- Black
- Asian



- Same Sex Couples vs. Singles
- LGBTQ Parents
- Regional Differences
- Activities: Cycling, wine, etc.
- Inclusive religious communities



Greater Fort Lauderdale CVB: LGBTQ Segmentation



Greater Fort Lauderdale CVB: LGBTQ Segmentation



Greater Fort Lauderdale CVB: LGBTQ Segmentation

greater FORT LAUDERDALE
HELLO SUNNY
sunny.org

**LGBTQ MILLENNIAL
TRAVEL TO
FORT LAUDERDALE**

CMI MARKET INTELLIGENCE REPORT
JANUARY 2017

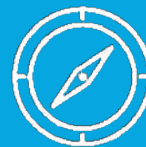
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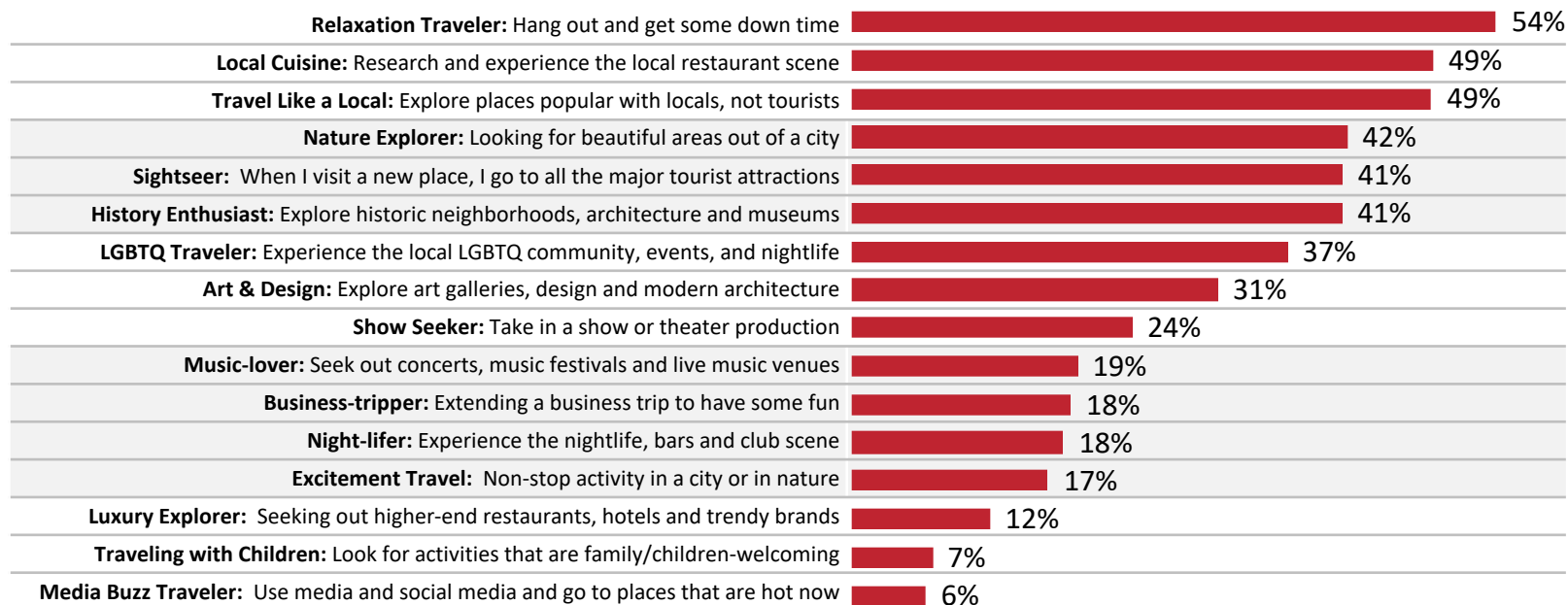
23rd Annual LGBTQ Tourism & Hospitality Survey

USA Overview Report
December 2018



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

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



Base: All LGBTQ n=5,691

Attributes that Attract LGBTQ Travelers

Scenic Beauty: Imagery presenting LGBTQ travelers *experiencing* the beauty of your destination

Safe and LGBTQ-welcoming: Safety is among the top motivators/concerns of LGBTQ travelers

Seeking LGBTQ Community: Large or small LGBTQ community is everywhere

LGBTQ Nightlife: More important for gay and bisexual men

Outdoor/Hiking: More important for lesbian and bisexual women

Local Food and Restaurants: The more local, the better for the LGBTQ community, especially Millennials

Arts and Culture: Your cultural attractions matter, but this trends somewhat older

History: The LGBTQ community appreciates the historical perspective

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

LGBTQ FAMILY TRAVEL

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

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



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



A Vacation Destination



LGBTQ-friendly



39%

Child-friendly



A Hotel or Paid Accommodation



LGBTQ-friendly



36%

Child-friendly



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



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Leaders in LGBTQ Research since 1992

INTERNATIONAL TRAVEL BY U.S. LGBTQ TRAVELERS

Do you have a valid passport?

Among All LGBTQ

YES:
77%



NO: 23%

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

Among those who have a valid passport

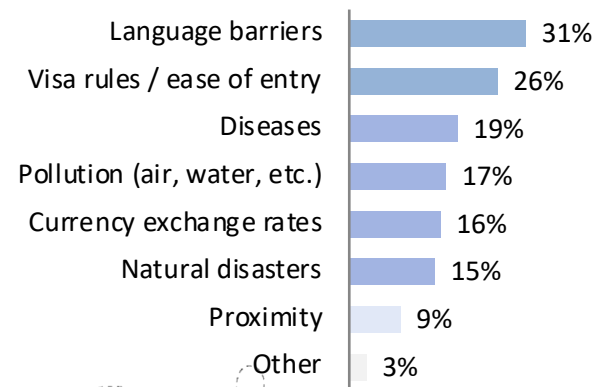
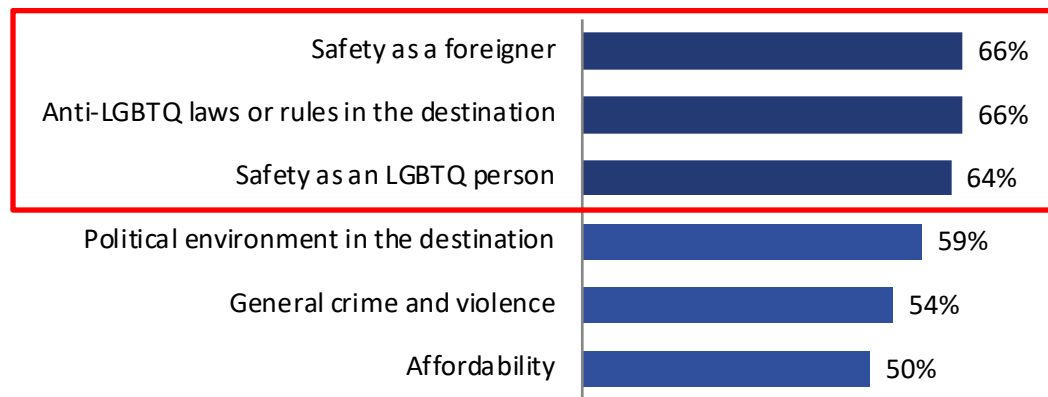
Yes, for travel to another country	53%
No, I did not travel to another country	47%



INTERNATIONAL TRAVEL BY U.S. LGBTQ TRAVELERS

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

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



In Conclusion: Follow Up

Learn more about LBGTQ Tourism Opportunities:

Research reports for free download on www.CMI.info



**Annual LGBTQ Community
Survey: Since 2007
40,000 Participants
In 151 countries**



**Annual LGBTQ Tourism
Study:
Since 1994
7,500 Participants**





In
partnership
with



CMI's 20th LGBTQ TOURISM FORUM

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*Proud members
since 1993*

LGBTQ Research Panel 2019

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

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



60,000
LGBTQ Panelists
in the USA



7,500
LGBTQ Panelists
in Canada
(English + French Speaking)



4,500
LGBTQ Panelists
in China



Capabilities in the
UK, Germany,
Australia and other
countries



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

20,000+
Lesbian and
bisexual women



30,000+
Gay and
bisexual men



3,000
Transgender
community
members



7,000
Bisexual
community
members



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



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



Participants in all 50 states



Zip code-level geographic
targeting capability

Thousands of men living with HIV

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



18,000
Representing
the LGBTQ
community
of color



20,000
LGBTQ
Millennials



10,000
With a master's
degree or higher



4,000
LGBTQ parents with
a child under 18
living at home



10,000
Legally married
same-sex couples



LGBTQ youth research
experience
(in partnership with an
institution and IRB approval)



LGBTQ Research and Corporate Training

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

LGBTQ Market Research:

There is a difference!

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

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

CMI'S PROPRIETARY PANEL

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

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

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

Community Marketing & Insights emphasizes that there is no "gay market," just as there is no single "Asian market." The LGBTQ communities represent a broad and dynamic spectrum of interests, sensitivities, preferences and priorities. Add to that variations in geographical location, age, income, relationship status, gender identity and more, and it becomes essential to discover which opportunities within LGBTQ will help you achieve your goals. Fine-tuning your approaches based on highly refined, well-targeted matches within LGBTQ will make your outreach initiatives more efficient and cost-effective, optimizing your marketing investment.

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

CMI'S INDUSTRY-STANDARD QUANTITATIVE SURVEYS

CMI has conducted hundreds of LGBTQ-dedicated quantitative surveys since the early 1990s, covering a wide variety of topics, industries and interests. Through these studies, we both observe and influence the trends of this market. Size does matter when it comes to surveys. Our panel has grown to over 90,000 qualified and active LGBTQ consumers—the largest of its kind, by far. Our Annual LGBTQ Community Survey® study has attracted up to 45,000 survey participants representing 150 countries, making it the largest such study in the world. We leverage our long history, experience and expertise to guide you, fine-tuning our portfolio of research panels, methodologies and approaches to best match your market intelligence goals.

Note: Without access to this enormous resource of qualified LGBTQ consumer panelists, other companies have to compromise on the quality and demographic representation of their panel—or "reinvent the wheel" at your expense. It's not possible to fathom the diversity and complexities within LGBTQ (see below) through a small sample. CMI fields surveys of 1,000+ responses. You might see some research with small samples, but they lose the opportunity to derive statistically-significant crosstabs based on gender, geographical location, age, income, experience, product choice, etc. Can you really make an assumption that a Millennial lesbian couple in Seattle has the same purchasing motivations and behaviors as a 67-year-old gay man in Miami? Generalities and sweeping statements about "the LGBTQ market" based on comparatively small samples can distort the validity of research findings, wasting your investment of time and resources.

GAIN A DEEPER UNDERSTANDING OF THE LGBTQ COMMUNITY: QUALITATIVE RESEARCH

For over two decades, CMI has produced the most consistent, longest-running series of LGBTQ community surveys in the world. But we don't stop there. Quantitative (data) research is important, but it's just one side of the coin. Our full range of research services uncover the rest of the story through qualitative research, most notably derived from focus groups.

We pre-qualify our focus group participants from among our survey panelists, identifying the best candidates based on characteristics such as age, gender, relationship status, geographical location, and even a propensity or history of using the client's products or services. We maintain sufficient numbers of panelists to conduct groups in most major metro areas across the USA, Canada, UK, Germany, Australia and China, as well as many other markets. Sometimes the same creative, tested in different regions, can yield different perspectives. Isn't it wise to know that—and adjust your plans—before investing in marketing campaigns?

CMI is the only LGBTQ-dedicated research provider that produces and facilitates qualitative research, including focus group studies (both in-person and online), in-depth interviews, online communities and advisory boards, which can round out a comprehensive market intelligence plan.

Note: By producing online surveys only, other research companies are telling only half of the story...at best. Without actual consumer interaction, they cannot fathom the deeper insights hiding behind the bar graphs and pie charts. Nor can they adequately advise you on the sensitivities and complexities that can only be uncovered by qualitative research—extremely important considerations that averages and assumptions extrapolated from survey statistics are likely to miss.

IN-HOUSE EVERYTHING. WE DON'T OUTSOURCE!

Community Marketing & Insights maintains our own research panels and utilizes advanced research software. We conduct all of our research in-house—because nobody knows this market segment as well as we do.

Note: Unlike many other firms, CMI will never sell or represent another research company's services. Nor will we outsource your projects and report on the results of a third party's work. Without being intimately involved in every aspect of a project—discussing client goals, designing the study, building and implementing the survey, and engaging directly with consumers in focus groups—it is difficult to gain the insights that we regularly deliver. CMI's hands-on LGBTQ research specialization spanning over two decades is unmatched.

VALUE FOR THE INVESTMENT

You might think that with this kind of specialization and experience, you'd have to invest considerably more for Community Marketing & Insights services than for research from other companies. With our specific focus on LGBTQ market intelligence, however, and the cumulative 60+ years of LGBTQ-dedicated experience among the CMI team, we're able to keep your costs low. We don't spend your money locating qualified survey or focus group participants, and we won't waste time trying to source comparative data or case studies. We've already done all that, for your benefit, over the past 25+ years.

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

WE ARE TRUSTED. WHY THIS IS IMPORTANT:

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

One of the questions in HRC's Corporate Equality Index application is whether the applicant company includes LGBTQ-owned suppliers when sourcing products and services. When you contract with Community Marketing & Insights, you not only gain the benefit of our long-standing leadership in this field, you are working with one of the world's only LGBTQ-owned market research providers. Community Marketing, Inc. is an NGLCC Certified LGBTQ-Owned Business Enterprise.

CMI is involved in the LGBTQ community: We volunteer time, donate resources and raise funds for numerous community-based organizations. We also participate in leading business and advocacy organizations, events and conferences within the community, such as Out & Equal, HRC, National LGBT Chamber of Commerce, GLAAD, NCLR and the International Gay & Lesbian Travel Association. Our community connection is not only the right thing to do, it is essential for maintaining authentic community relationships to benefit our clients.